INTERNATIONAL TOURISM

4th QUARTER
PERFORMANCE REPORT

Oct - Dec

20
25

South Africa

SOUTH AFRICAN TOURISM

TABLE CONTENTS

OVERVIEW

EXECUTIVE SUMMARY

In Q4 2025, South Africa's tourism sector closed the year on a firmer footing, with gains in arrivals, bed nights and spend reinforcing the strength of inbound travel.

- International arrivals reached 2.9 million in Q4 2025, reflecting a +19.7% increase over 2024 and +7.5% above 2019, marking the strongest quarter in the recent cycle. Growth remained firmly anchored in Africa (74.8% share), with both land (+21.4%) and air (+19.0%) segments driving expansion, while long-haul markets showed uneven progress relative to pre-pandemic benchmarks.
- Regional performance highlights a continued reliance on African markets, which are now +12.2% above 2019, alongside Australasia (+10.8%). In contrast, Europe (–1.7%) and the Americas (–0.6%) are nearing parity, while Asia (-30.6%) and the Middle East (-27.3%) remain significantly below earlier levels, reinforcing asymmetric recovery across long-haul segments.
- Travel purpose remains increasingly consolidated around VFR, which rose to 54.1% of arrivals, significantly above both 2024 and 2019 levels. Holiday travel (19.2%) edged higher, while business-related travel softened marginally, indicating a continued shift toward social and regionally driven travel patterns.
- Foreign direct spend reached ZAR 28.8 billion, up +13.5% year-on-year and +33.2% above 2019, supported by higher volumes and extended stays. However, average spend per visitor declined to ZAR 10 800 (-5.3% YoY), reflecting a combination of exchange rate appreciation effects witnessed in Q4 2025 and a VFR-heavy visitor mix.
- A divergence between volume and value continues to define performance. Africa contributes 74.8% of arrivals but only 42.9% of spend, while overseas markets generate 57.1% of total spend from just 25.2% of arrivals, underscoring the higher spend intensity of long-haul travel.
- Africa Land drove a sharp increase in trip duration to 16.9 nights, with Africa Air stable and overseas visitors recording shorter but higher-value stays, reflecting distinct segment roles. This lifted overall length of stay to 16.2 nights (+19.8% YoY), supporting strong growth in total bed nights (45.0 million, +44.1% YoY).
- Accommodation patterns remain heavily skewed toward informal lodging, with friends and relatives accounting for 74.7% of all bed nights, particularly among land arrivals. Formal accommodation participation remains concentrated among air and overseas visitors, highlighting structural differences in economic contribution across segments.
- Visitor experience remained strong, with overall satisfaction at 4.6 and experience ratings at 8.8, supported by high scores for natural attractions, hospitality, and value for money. However, safety and security continue to lag, remaining the most persistent concern across markets.
- Africa Land and Africa Air recorded lower multi-province travel at 2.3% and 8.4%, while overseas visitors continued to drive broader dispersion at 30.7%. This resulted in overall geographic spread easing to 9.2%, reflecting more focused travel patterns while maintaining reach from higher-value markets.
- Gauteng recorded 1.2 million arrivals (+23.9% YoY; above 2019 levels), accounting for the largest share of national arrivals and generating ZAR 13.0 billion (45.1% of total spend). Travel remained VFR-led (50%+) alongside strong business and retail participation, reinforcing its role as the primary gateway and commercial hub.
- Mpumalanga welcomed 734.4 thousand visitors (+32.5% YoY; above 2019 levels), driven largely by regional markets. VFR accounted for over 60% of travel, while nature-based attractions such as Kruger National Park continued to anchor visitation. The province generated ZAR 2.4 billion in foreign direct spend.
- Western Cape received 466.8 thousand arrivals (+14.9% YoY), with holiday travel leading at over 50%. The province generated ZAR 7.9 billion (27%+ of national spend) and exhibited high geographic dispersion and formal accommodation participation, supported by strong overseas demand.
- Free State recorded 200.8 thousand arrivals (+3.4% YoY), predominantly from Lesotho. Travel was strongly VFR-driven (80%+), with over 80% of bed nights spent with friends and relatives. The province generated ZAR 0.9 billion in foreign direct spend.
- KwaZulu-Natal welcomed 214.7 thousand visitors (+12.2% YoY; above 2019 levels). VFR (~50%) and holiday travel (~20%) both contributed, supported by coastal tourism and retail activity. The province generated ZAR 1.9 billion in spend.
- Limpopo recorded 116.4 thousand arrivals (–36.4% YoY), remaining below 2019 levels. Travel reflected a combination of VFR, wildlife and shopping activity, with game lodges accounting for a notable share of bed nights. The province generated ZAR 1.6 billion in foreign direct spend.
- North West welcomed 120.2 thousand visitors (+9.2% YoY), largely from neighbouring markets. VFR represented just over half of travel, while Pilanesberg and Sun City remained key attractions. The province generated ZAR 1.1 billion in spend.
- Eastern Cape received 106.6 thousand arrivals (+17.6% YoY; below 2019 levels), with holiday and VFR both significant. Wildlife, coastal and heritage assets supported visitation, generating ZAR 1.3 billion in foreign direct spend.
- Northern Cape recorded 29.8 thousand visitors (+54.8% YoY), predominantly regional and VFR-led. Heritage and conservation attractions anchored participation, with the province generating ZAR 0.5 billion in spend.
- Overall, Q4 2025 reflects a tourism sector driven by scale, duration, and regional demand, with value increasingly shaped by visitor mix rather than per-capita spend, and long-haul performance remaining uneven across key markets..

KEY PERFORMANCE INDICATORS

		vs. 2019	vs. 2024
INTERNATIONAL TOURIST ARRIVALS	2.9 MILLION	+7.4% ▲	+19.7% ▲
TOTAL FOREIGN DIRECT SPEND	ZAR 28.8 BILLION	+33.2% ▲	+13.5% ▲
AVERAGE FOREIGN DIRECT SPEND	ZAR 10 800	+24.1% ▲	-5.3% ▼
LENGTH OF STAY	16.2 NIGHTS	+38.4% ▲	+19.8% ▲
TOTAL BED NIGHTS	45.0 MILLION	+51.7% ▲	+44.1% ▲
GEOGRAPHIC SPREAD	9.2%		* -1.1 ▼
SATISFACTION RATING	4.6	+2.6% ▲	+1.2% ▲

Key growth and change rates shown in this report (except for Geographic Spread) are in comparison to both 2024 and 2019.
Change in percentage points (P.P) vs. 2024.

Q4 2025 INSIGHTS, OPPORTUNITIES, AND CONSIDAERATIONS

Based on the Q4 2025 inbound survey tourism data analysis, some key insights, opportunities, and cautions emerge beyond the topline recovery story.

i. Growth in total spend this quarter was largely supported by Africa markets, where higher arrivals and longer stays offset lower spend per visitor, while overseas markets relied more on higher per-trip spend despite shorter stays.

ii. For the first time in recent periods, visitors from Africa stayed longer than those from overseas markets, though this extended duration was accompanied by lower spend per visitor.

iii. Geographic spread declined across all segments this quarter, with overseas markets recording a third consecutive decline, though they remain the most likely to visit multiple provinces (30.7%).

iv. Holiday travel continued to strengthen, supported by both land and overseas markets, with Africa land arrivals exceeding the 10% mark for the first time in several years, while MICE activity remained steady at relatively higher levels within air-based travel.

i. Turn longer stays from Africa markets into higher spend, by promoting affordable activities, local transport, and retail during extended visits.

ii. Introduce targeted offers for longer-stay visitors, such as bundled experiences and mid-stay add-ons, to increase daily spend without changing trip purpose.

iii. **Protect and grow high-value overseas spend**, by strengthening premium experiences and ensuring continued appeal for higher-spending travellers.

iv. **Build on growing holiday demand, particularly from land and overseas markets, by expanding accessible leisure products and destination offerings.**

i. **Longer stays form Africa tourist are not translating into higher spend per visitor, which may limit overall value growth if this continues.**

ii. **Lower spend from Africa markets may dilute total yield**, despite strong growth in arrivals and length of stay.

iii. **Declining geographic spread across Africa Land, Africa Air and Overseas tourist reduces the distribution of tourism benefits**, concentrating activity in fewer provinces.

iv. **Safety concerns remain a persistent drag on visitor perception**, despite strong overall satisfaction levels.

OBJECTIVES

OBJECTIVES ABOUT THE SURVEY

The Departure Survey commissioned by South African Tourism since 2001 is a key instrument for gathering insights about foreign tourists exiting South Africa via major airports and border posts. Its primary objective is to track and understand travel behaviours, expenditure patterns, site visits, and overall satisfaction levels of tourists. The data collected is pivotal for evaluating South Africa's performance against key tourism objectives, including increasing tourist volume, improving geographic spread, boosting tourist spend, enhancing seasonality patterns, and promoting longer stays. Additionally, it supports the development of effective marketing strategies, addressing market needs, and facilitating sustainable GDP growth, job creation, and transformation in alignment with the Tourism Act's mandates.

ABOUT THE REPORT

DEFINITIONS

- **Visitor -** Any person travelling to a place other than his/her usual environment for less than 12 months and whose main purpose for the travel is other than the exercise of an activity to be remunerated at the place visited.
- **Same day visitor** – Any person who visits a place without staying the night.
- **A tourist** is an overnight visitor taking a trip to a main destination outside his/her usual environment, for less than a year, for any main purpose (business, leisure or other personal purpose) other than to be employed by a resident entity in the country or place visited.
- **Geographic spread** - is the distribution of tourists across different regions or locations, indicating how tourism activities are spread geographically. For this survey, the statistic is obtained by expressing the total number of tourists that visited more than one province as a proportion of the total arrivals.
- **TDFS** - Stands for Total Foreign Direct Spend within South Africa. When reported it excludes the component spent on capital goods.
- **Average Spend** - Is the spend per tourist, obtained by dividing the total direct spend (TFDS) by the number of tourists.
- **Bed nights** - Is a measure of occupancy representing the total number of nights tourists stay in South Africa.
- **Length of stay** - Is the duration of time that a visitor or tourist spends at a destination or in the country; in this survey, it is calculated by dividing total bed nights by the total number of tourists.

ABOUT THE REPORT

INTERNATIONAL TOURIST ARRIVALS

This report was prepared by South African Tourism's Analytics and Insights Unit and is based on the South African Tourism's Departure Survey which has been deployed by SA Tourism since 2001 to monitor and measure international tourist behaviour as they leave South Africa. The survey aims to track tourist travel behaviours, expenditures, accommodation usage, experiences, as well as satisfaction with South Africa as a tourism destination. The survey first began as a point-in-time survey conducted in winter and summer.

The survey is conducted monthly and covers South Africa's two main international airports (Oliver Tambo and Cape Town) as well as the 12 main land border posts (Grobler's Bridge, Maseru Bridge, Oshoek, Golela, Kopfontein, Pioneer Gate, Lebombo, Beitbridge, Vioolsdrift, Nakop, Ficksburg, Ramatlabama), the latter being the largest point of entry into South Africa by foreign nationals. Durban's King Shaka International Airport as well as all seaports are currently excluded from the survey as they receive less than 5% and 1% of international tourist arrivals respectively.

The survey is based on a random stratified sampling framework of n=3 800 per month for both of the airports and n=1 000 per month for all land border posts. The sample framework is derived from Statistics South Africa (StatsSA) tourist arrivals data and the survey results are weighted back according to the same tourist arrival data. The margins of error for the airport and land border post monthly samples are 1.6% and 3.1% respectively, both at a 95% confidence level. As such, the survey accurately represents tourists arriving in South Africa as well as their behaviours and opinions. Arrival numbers given are actual tourist arrivals from StatsSA and not tourist arrivals as calculated by the survey. When crossed with other survey variables, tourist arrival numbers are survey-based.

ABOUT THE REPORT

ADDITIONAL SOURCES USED IN THIS REPORT

1. P0350 - International Tourism, December 2025
2. P0350 - International Tourism, November 2025
3. P0350 - International Tourism, October 2025
4. P0141 - Consumer Price Index (CPI), December 2025
5. P0141 - Consumer Price Index (CPI), November 2025
6. P0141 - Consumer Price Index (CPI), October 2025
7. *P6410 - Tourist accommodation, December 2025*
8. P6410 - Tourist accommodation, November 2025
9. P6410 - Tourist accommodation, October 2025
10. P0441 - Gross Domestic Product (GDP), 3rd Quarter 2025
11. https://www.unwto.org/news/international-tourism-recovers-pre-pandemic-levels-in-20254
12. https://www.unwto.org/un-tourism-world-tourism-barometer-data
13. World Tourism Barometer: January 2026
14. https://tradingeconomics.com/south-africa/gdp-growth-annual

ABOUT THE REPORT

DISCLAIMER

SA Tourism's Analytics and Insights Unit makes every effort to publish reports that are error-free. However, with the large number of complex records that are analysed, we cannot guarantee that all reports are totally free of error. All errors that are detected are immediately corrected, and the latest version of the report is always made available on www.southafrica.net/research.

To access this report online, please visit the research section on the South Africa Tourism website at www.southafrica.net/research or for more information e-mail: research@southafrica.net.

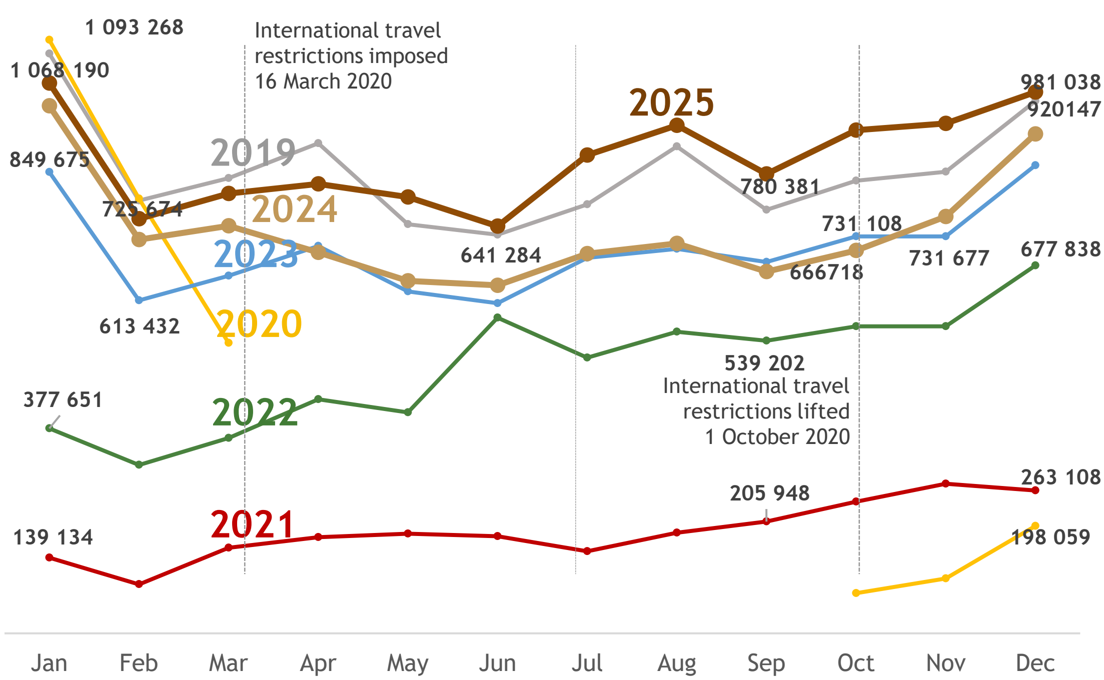
ABOUT THE REPORT

IMPACT OF COVID-19 ON THE SURVEY

Due to the Covid-19 pandemic, surveying international tourists at airports and land border posts became impossible and the survey stopped at the end of March 2020. Surveying land border posts became possible only in November 2020, but airports remained impossible to survey till mid-August 2021. Hence, land border post data was imputed for October 2020, and for airports, October-December 2020 data was imputed. Imputation is the process of replacing missing data with substituted values whereby projections of missing data are based on an existing mathematical relationship present in the available data set. Hence, the process was based on corresponding and comparable retrospective values for which full data sets were present.

Since interviewing at the airports became possible only in mid-August 2021, data for Q1 2021 was obtained by readjusting Q1 2020 data for visit purposes recorded by StatsSA in Q1 2021. The output was then weighted based on the number of arrivals from different markets. The assumption made, was that tourists visiting the country for similar purposes are likely to visit similar attractions and, on average, stay for the same duration. For Q2 of 2021, the same data processing was conducted as had been done for Q1 2021 but using Q2 2019 data as there had been no international tourist arrivals in Q2 2020. Interviewing at the Oliver Tambo International Airport resumed in mid-August 2021, and at the Cape Town International Airport in September 2021. Hence, Q3 2021 numbers are based solely on data collected from mid-August till September end and weighted to cater for July and early August. From Q4 2021 onwards, the numbers shown are based solely on survey data.

International Tourist Arrivals in SA, 2019-2025[1]



[1] P0350 - International Tourism, December 2025; P0350 - International Tourism, November 2025; P0350 - International Tourism, October 2025

NOTE TO THE READER –COMPARISONS

The COVID-19 pandemic dealt a severe blow to the tourism industry in South Africa and globally since its onset in March 2020. Although the tourism sector has experienced a strong recovery over the last few years, recent trends suggest that this recovery is beginning to plateau. The industry is stabilising but has not yet reached full pre-pandemic levels, with global projections indicating a full recovery by 2025. In evaluating tourism performance, progress is often compared to 2019, a benchmark year unaffected by COVID-19. Leading tourism bodies, such as UNWTO and IATA, use these comparisons to assess whether the sector has returned to its pre-pandemic levels. According to the UNWTO Panel of Experts, ongoing economic challenges remain a significant factor impeding the full recovery of international tourism globally.

With this in mind, all of South Africa's international tourism performance KPIs are calculated over 2019, except for geographic spread, which is calculated over Q4 2023. Further, South Africa's GDP growth rate is calculated over the previous quarter as per the source for this (Statistics SA).

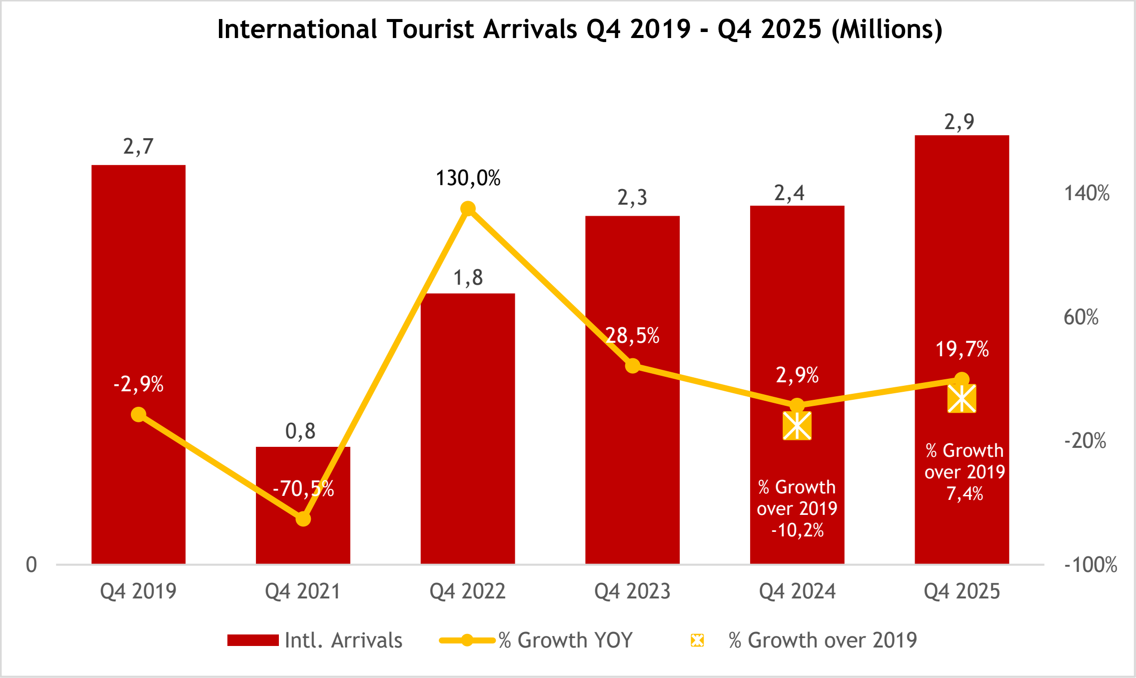
Nonetheless, in order to show what progress has been made since Covid-19, YOY growth rates are provided for all periods (Q4 2019 – Q4 2024). *In the narrative, where Q4 2024 figures are compared to Q4 2023 & Q4 2022's results rather than to Q4 2019's, the commentary is in italics.* In charts, comparisons to Q4 2023 are part of the YOY line graph, while comparisons to Q4 2019 are plotted separately and clearly marked as such.

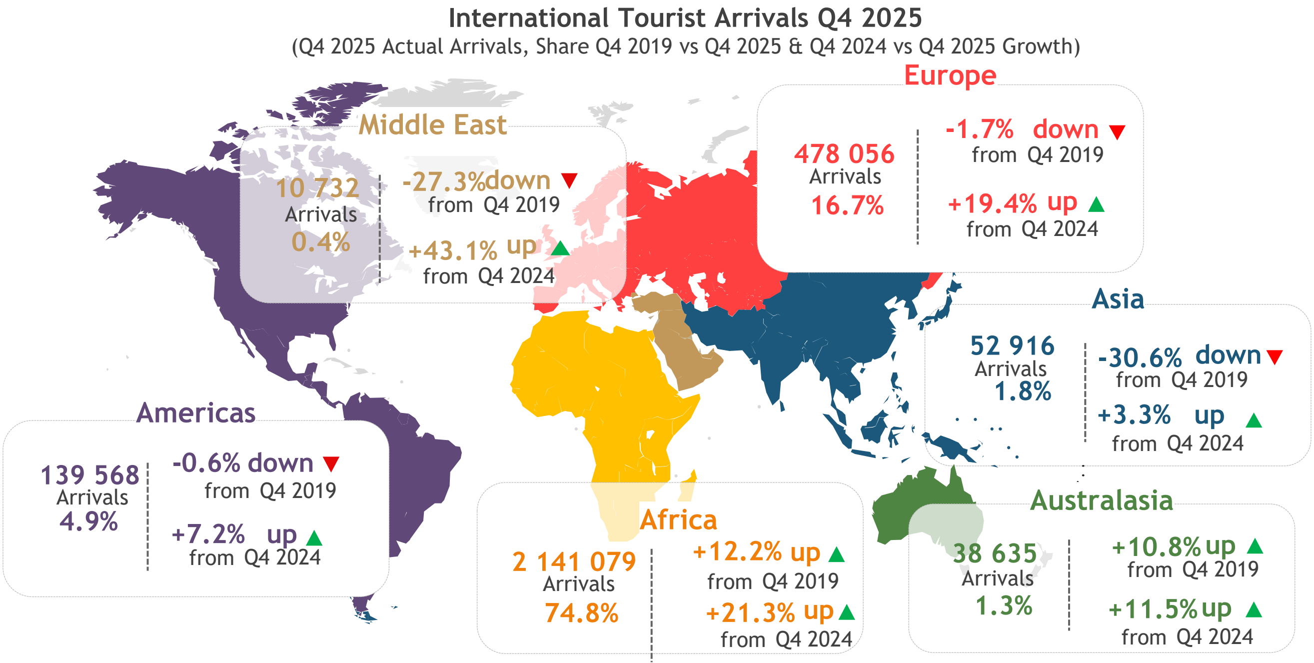
INTERNATIONAL TOURISM PERFORMANCE

INTERNATIONAL TOURIST ARRIVALS

2.9 MILLION +19.7%▲

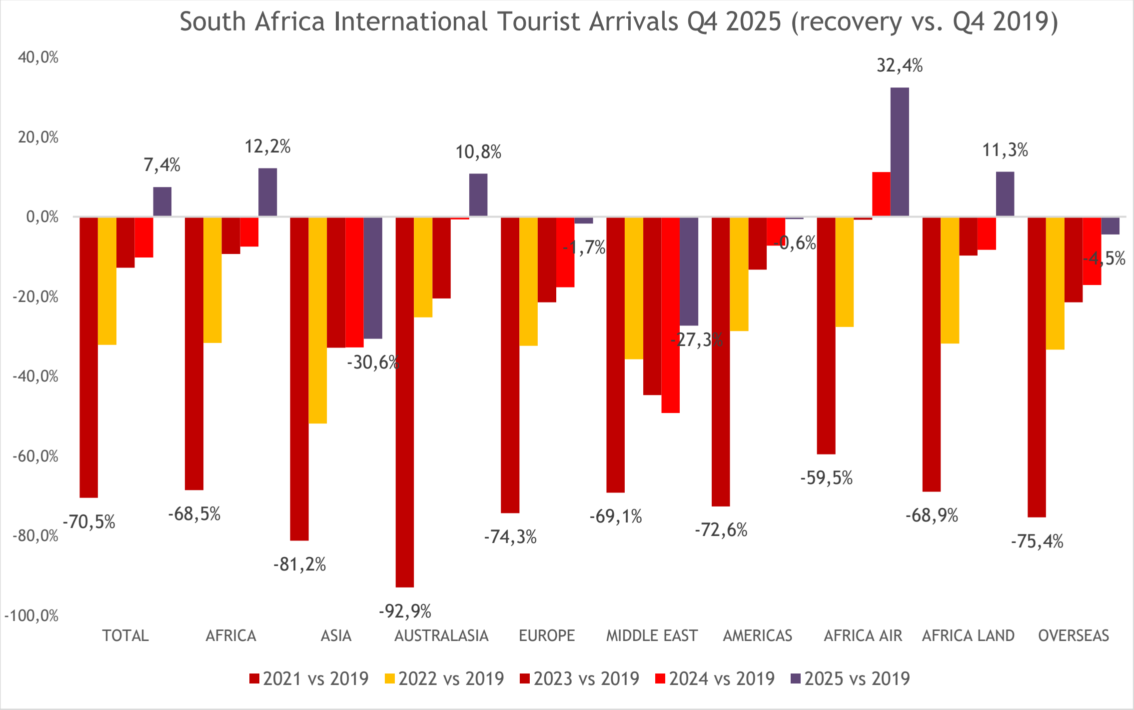
Closing the year on a firmer footing, South Africa recorded 2.9 million international arrivals in Q4 2025, reflecting a +19.7% increase over 2024 and +7.5% above 2019. This outcome extends the upward trend observed since 2022 and positions the quarter as the strongest in the recent cycle. Africa continued to underpin performance, accounting for 74.8% of arrivals and growing +20.9% relative to 2024, while remaining ahead of its 2019 level, with both land (+21.4%) and air (+19.0%) segments contributing to the uplift. Europe sustained its recovery, rising +19.4% compared to 2024 but still slightly below 2019, while the Americas posted more moderate growth of +7.2% and remained broadly in line with pre-pandemic volumes. Asia showed limited acceleration at +3.3% and continues to lag its earlier baseline, whereas the Middle East, despite low volumes, recorded the fastest increase at +43.1%. Taken together, Q4 2025 reflects continued expansion driven largely by African markets, with uneven progress across long-haul segments pointing to where further gains are still required.





INTERNATIONAL TOURIST ARRIVALS **2.9 MILLION** **+19.7%**

Growth momentum in Q4 2025 was widely spread, with Africa (+21.3%) and Australasia (+11.5%) leading the expansion relative to 2024, while Europe (+19.4%) and the Americas (+7.2%) also recorded steady gains. Asia (+3.3%) showed only limited improvement and the Middle East (+43.1%), despite its sharp rise, continues from a low base with uneven progression in recent years. Against 2019, Africa (+12.2%), Australasia (+10.8%), and Africa Air (+32.4%) have moved ahead of pre-pandemic levels, while the Americas (-0.6%) are near parity and Europe (-1.7%) has almost closed the gap. Asia (-30.6%) and the Middle East (-27.3%) remain notably behind their earlier benchmarks, indicating a slower pace of return among parts of the long-haul segment. Overall, the pattern points to continued reliance on African growth, with uneven long-haul recovery suggesting that gains are not yet fully entrenched across all regions.



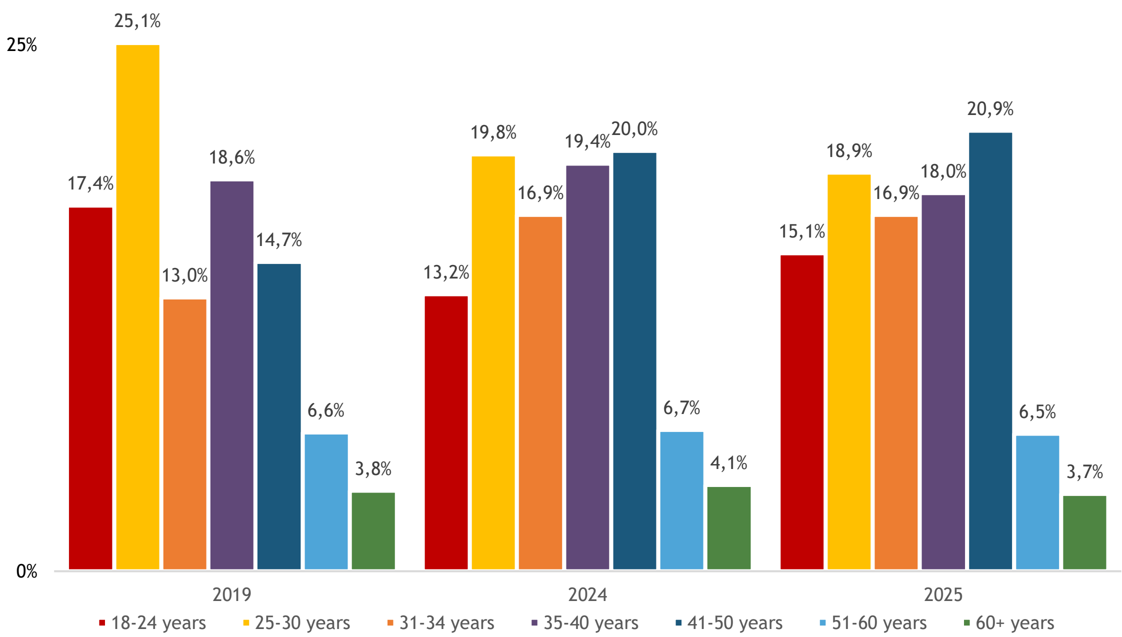
INTERNATIONAL TOURIST ARRIVALS

2.9 MILLION

+19.7%

During Q3 2025, the age profile of international tourists reflected a noticeable rebalancing compared with 2024. The 18-24 group recorded the largest recovery, rising by +1.9 pp, while travellers aged 31–34 also continued their upward trend. By contrast, the 25–30 and 35–40 cohorts saw slight declines, and the 51–60 and 60+ segments remained broadly stable. Relative to Q3 2019, the market has shifted toward an older visitor base. The 25-30 group remains significantly below pre-pandemic levels (-7.9 pp), whereas all age categories above 30 now exceed their 2019 shares. This points to a gradual ageing of South Africa's inbound market, with mid-career and mature travellers forming a growing share of demand—likely supported by higher disposable incomes, greater travel stability, and a slower youth-market rebound.

Age Group **Distribution** Q4 2019,Q4 2024 & Q4 2025

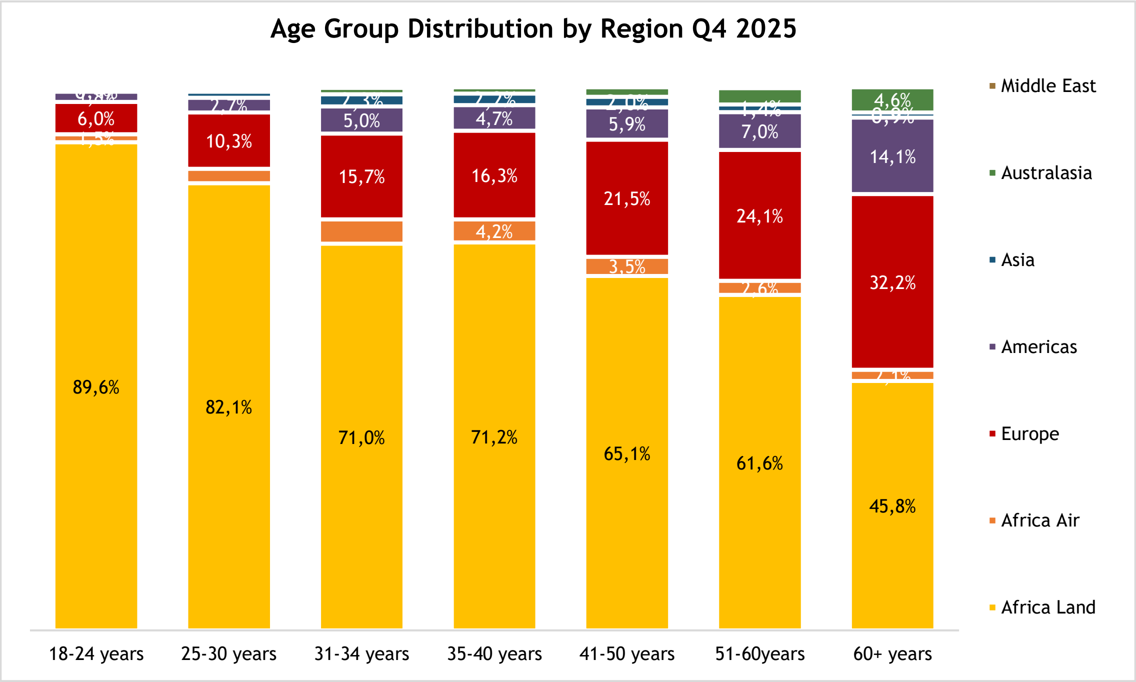


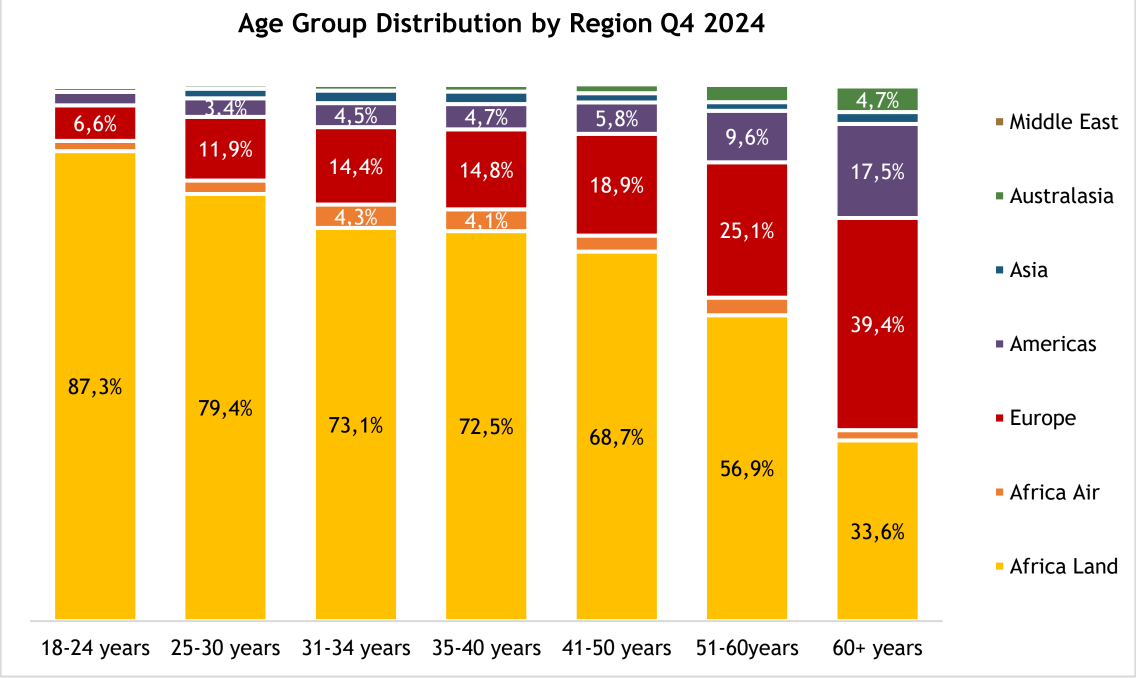
INTERNATIONAL TOURIST ARRIVALS

2.9 MILLION

+19.7%

Subtle shifts rather than broad changes define the Q4 2025 regional age mix when set against Q4 2024, with movements concentrated in specific cohorts. Africa Land continued to expand its spread, most notably among the 60+ group (+12.2pp) and 18–24 (+2.3pp), pointing to a wider age reach within this segment, while Africa Air remained largely stable across most brackets. Europe registered the more noticeable softening, particularly among the 60+ (-7.2pp) and 51-60 (-1.0pp) groups, with the Americas also showing declines in older cohorts, especially 60+ (-3.4pp) and 51–60 (-2.6pp). Younger segments, especially 18–24 and 25-30, held relatively steady across most regions, suggesting limited re-entry of youth-driven demand across long-haul markets.



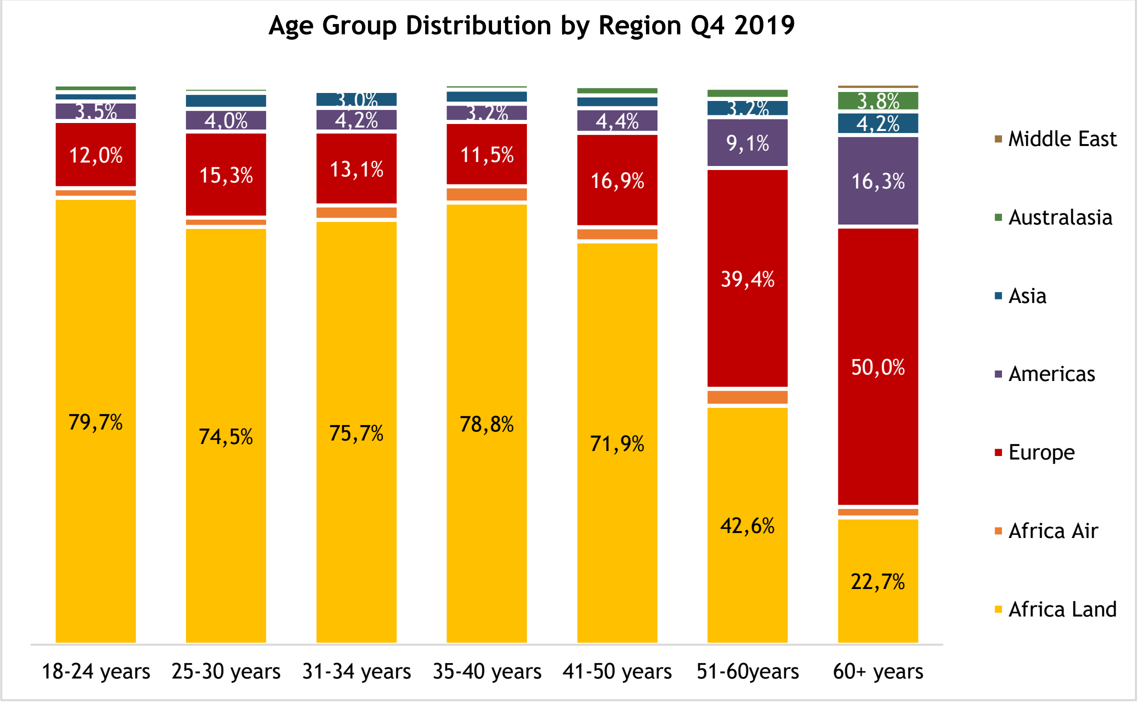


INTERNATIONAL TOURIST ARRIVALS

2.9 MILLION

+19.7%

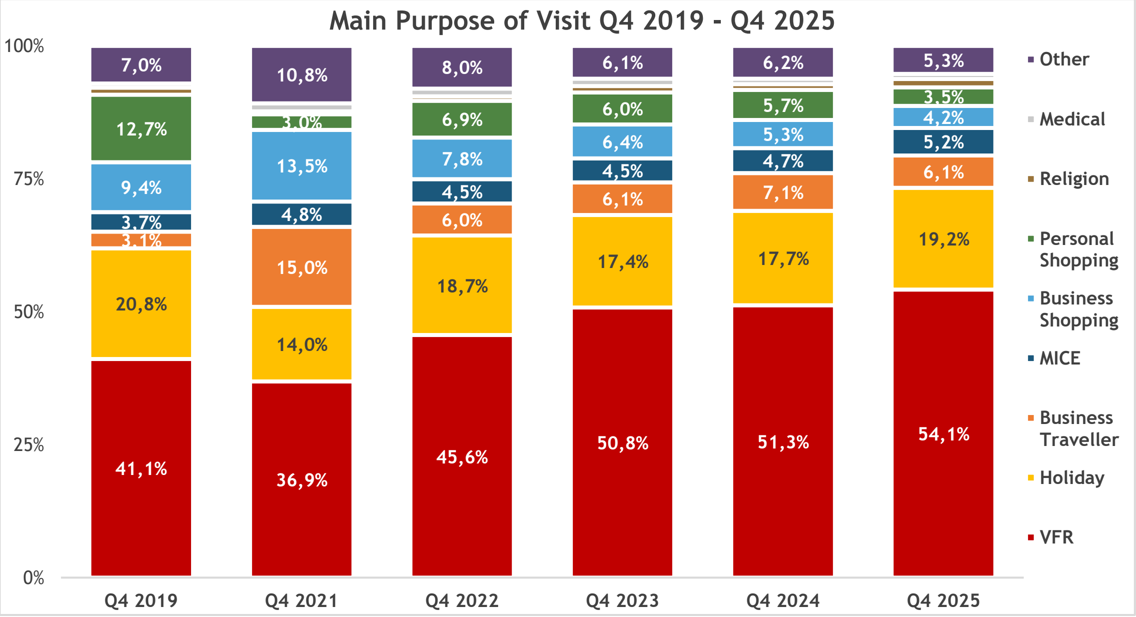
Compared to Q4 2019, the largest shifts remain centred on Africa Land, where older age groups have expanded markedly, led by 60+ (+23.1pp) and 51-60 (+18.9pp). Europe, in contrast, reflects a pullback in older travellers, with 60+ down –17.8pp alongside declines across several middle-age groups, while Asia and the Americas show milder contractions across selected cohorts. Gains among younger travellers are more contained, with Africa Land showing the clearest uplift in 18–24 (+9.8pp), while Australasia and other regions exhibit only limited variation. Taken together, the age composition across regions continues to tilt toward older travellers within Africa-driven flows, while long-haul markets show slower rebalancing across younger segments.

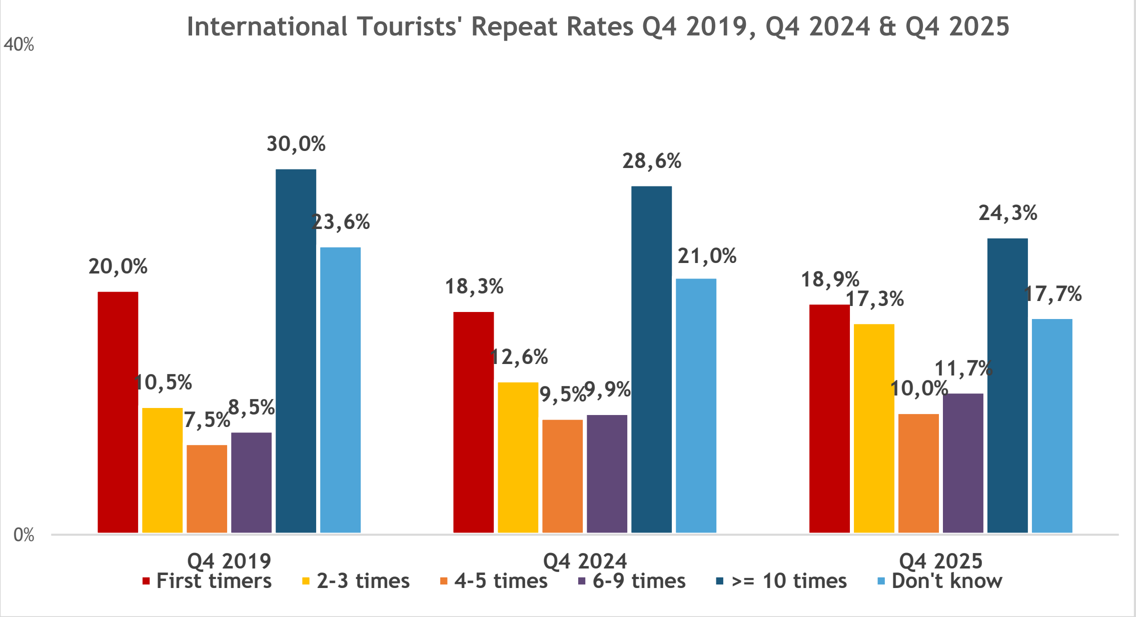


PURPOSE OF TRAVEL

Anchored by continued strength in VFR, the purpose-of-visit mix in Q4 2025 shows further consolidation, with this segment rising to 54.1%, up from 51.3% in 2024 and well above its 2019 level of 41.1%. Holiday travel edged higher to 19.2%, improving on 2024 (17.7%) and slightly ahead of 2019, while business-related travel softened marginally, with Business Traveller at 6.1% (down from 7.1%) and MICE at 5.2%, bringing the combined share to 11.3%, still above pre-pandemic levels. Personal Shopping declined further to 3.5%, extending its multi-year contraction, while Religion (1.6%) increased modestly and Medical held stable at 1.0%.

Repeat travel patterns point to a shift toward mid-frequency visits, with 2–3 trips rising to 17.3% (+4.7pp vs 2024) and 4–5 visits also increasing to 10.0%, while first-timers edged up slightly to 18.9%. Higher-frequency segments present a mixed picture, as 6-9 visits increased to 11.7%, but the 10+ category declined to 24.3%, remaining below its 2019 position. At the same time, “Don’t know” responses dropped to 17.7%, suggesting improved clarity among travellers. Overall, Q4 2025 reflects a strengthening base of returning visitors, with growth increasingly concentrated in mid-frequency travel, pointing to an opportunity to rebuild higher-frequency loyalty segments.

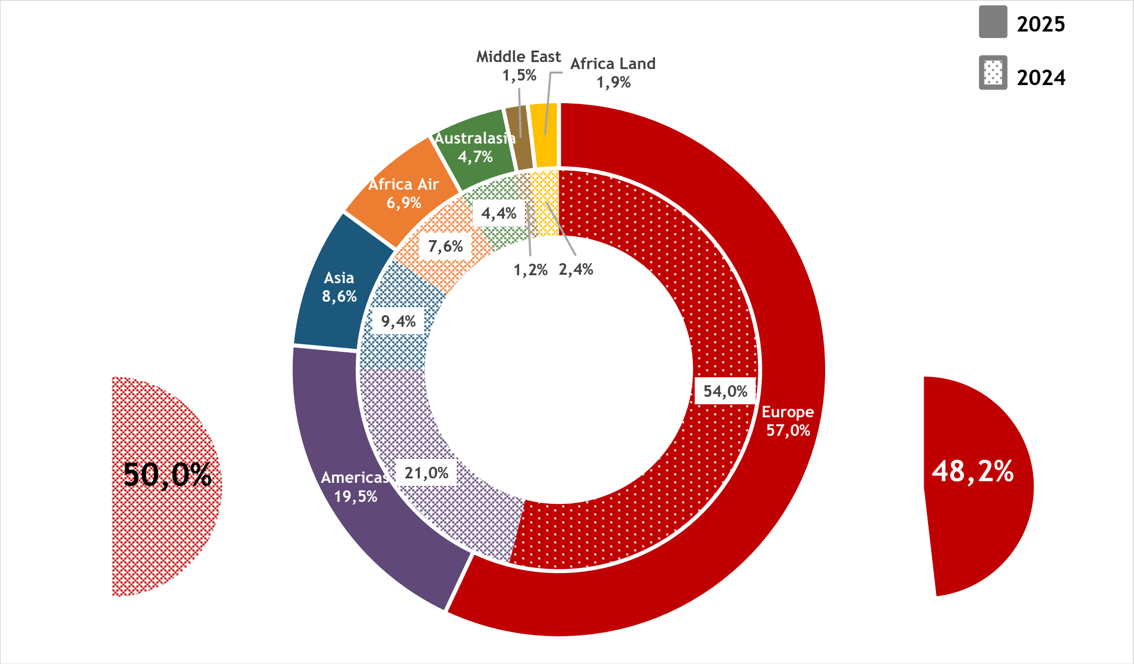


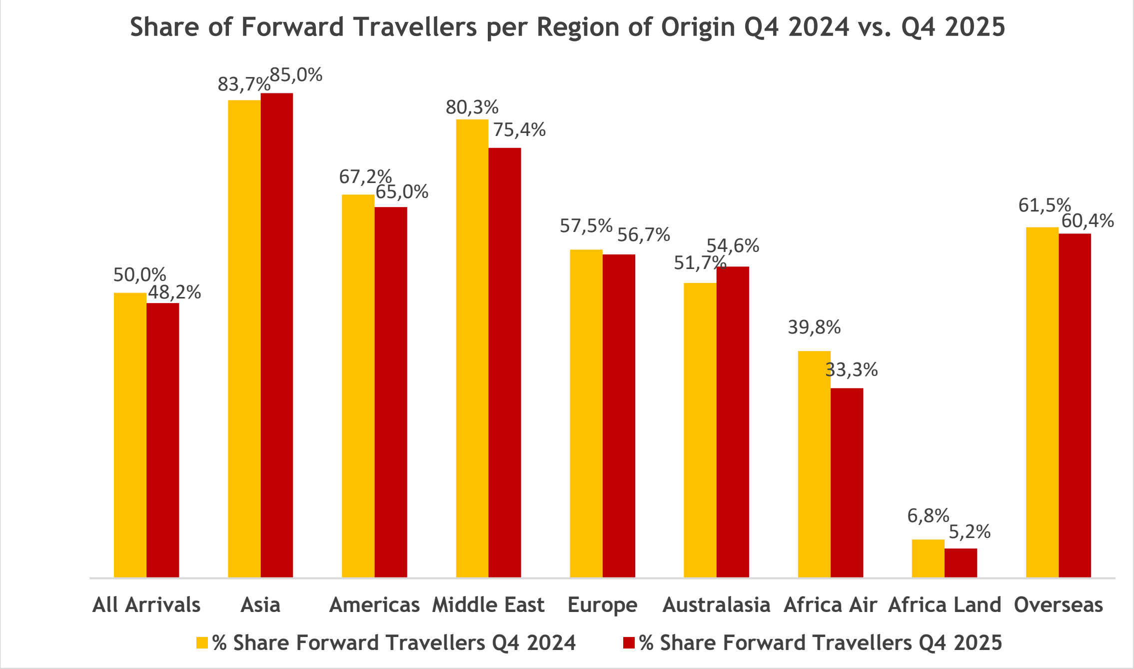


FORWARD TRAVEL

A marginal easing in onward travel is evident in Q4 2025, with 48.2% of international visitors continuing beyond South Africa, down from 50.0% in 2024. Overseas markets remain central to this pattern, with Asia (85.0%) and the Americas (65.0%) maintaining the highest forward-travel shares, reinforcing South Africa's role within multi-stop itineraries. Europe's contribution held broadly steady at 56.7%, while Australasia increased to 54.6% and the Middle East declined to 75.4%, indicating mixed adjustments across long-haul segments. Within Africa, divergence persists as Africa Air dropped to 33.3%, while Africa Land remained limited at 5.2%, reflecting the more destination-focused nature of these flows. From a composition perspective, Europe increased its share of forward travellers to 57.0%, while the Americas and Asia edged lower, pointing to a slight reweighting within overseas markets. Overall, the pattern suggests a stable but slightly consolidating forward-travel dynamic, with shifts in market mix indicating evolving routing behaviours across key source regions.

Share of All Forward Travellers by Region of Origin Q4 2025 vs. Q4 2024





FORWARD TRAVEL

Forward-travel routes in Q4 2025 show a reweighting across key destinations, with Europe, the Americas, Asia, and Africa Air reflecting a mix of gains and pullbacks while overall shares remain relatively steady. In Europe, the most notable declines were toward the United Arab Emirates (-1.5pp) and Turkey (-1.1pp), while Switzerland (+1.6pp), France (+2.1pp), and Namibia (+2.5pp) recorded stronger demand. Among travellers from the Americas, flows shifted toward the UK (+2.6pp) and Zimbabwe (+1.9pp), while the Netherlands (-2.5pp) and Turkey (-1.3pp) softened. Asia's forward patterns continued to favour the UAE (+2.6pp) and Qatar (+2.1pp), with Singapore (+4.3pp) also gaining, whereas Ethiopia (-5.6pp) saw the sharpest decline. Within Africa Air, Kenya (+2.8pp) maintained its position as the primary onward hub, with Rwanda (+1.9pp) and France (+2.1pp) also increasing, offsetting declines in Ethiopia (-5.7pp) and Malawi (-3.7pp). Overall, Q4 2025 reflects a consolidation of preferred onward routes, suggesting more defined travel pathways across key source markets.

Europe Top 10 Forward Markets	% Share Q4 2024	% Share Q4 2025
United Arab Emirates	16.5%	15.0%
Qatar	11.6%	13.5%
Turkey	12.3%	11.2%
Germany	8.4%	10.6%
Ethiopia	11.8%	9.3%
Switzerland	5.3%	6.9%
UK	6.3%	6.0%
Netherlands	8.4%	6.0%
France	3.9%	6.0%
Namibia	1.5%	4.0%
Others in Top 10 Q4 2024		
Kenya	3.1%	2.2%
All Europe Forward Tourists	54.0%	57.0%

Americas Top 10 Forward Markets	% Share Q4 2024	% Share Q4 2025
UK	19.3%	21.9%
United Arab Emirates	8.4%	9.3%
Netherlands	10.7%	8.2%
Qatar	7.0%	7.3%
Zimbabwe	5.2%	7.1%
Germany	5.3%	6.9%
Ethiopia	6.2%	6.7%
France	3.7%	4.6%
Kenya	7.5%	4.4%
Turkey	4.9%	3.6%
Others in Top 10 Q4 2024		
All Americas Forward Tourists	21.0%	19.5%

Asia Top 10 Forward Markets	% Share Q4 2024	% Share Q4 2025
United Arab Emirates	42.67%	45.3%
Qatar	14.3%	16.4%
Singapore	8.4%	12.7%
Ethiopia	14.4%	8.8%
Kenya	9.4%	6.6%
Turkey	1.2%	2.4%
Malawi	0.8%	1.6%
UK	0.5%	0.9%
Hong Kong, China	0.6%	0.9%
Rwanda	0.8%	0.8%
Others in Top 10 Q4 2024		
Botswana	0.9%	0.1%
Germany	0.8%	0.0%
All Asia Forward Tourists	9.4%	8.6%

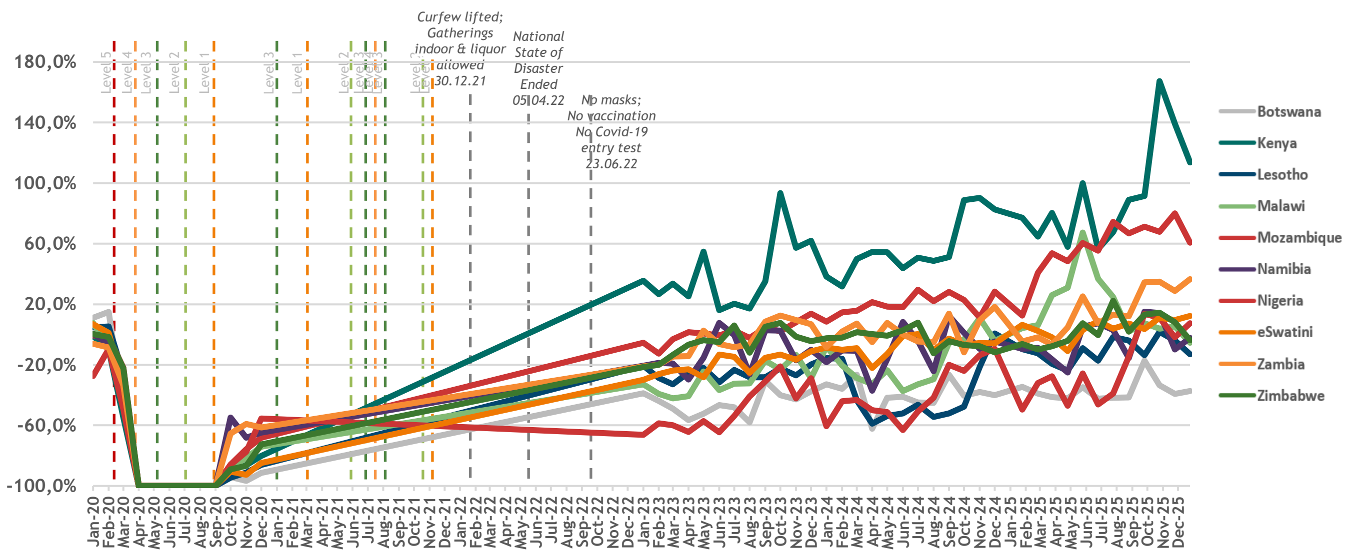
Africa Air Top 10 Forward Markets	% Share Q4 2024	% Share Q4 2025
Kenya	33.1%	35.9%
Ethiopia	24.7%	19.0%
Malawi	16.3%	12.6%
Rwanda	2.7%	4.6%
Ghana	3.7%	4.1%
France	1.8%	3.9%
Qatar	1.0%	3.1%
Angola	2.2%	2.4%
United Arab Emirates	2.7%	2.3%
Zimbabwe	1.2%	1.7%
Others in Top 10 Q4 2024		
Uganda	1.8%	1.3%
Egypt, Arab Rep.	2.6%	0.0%
All Africa Air Forward Tourists	7.6%	6.9%

AFRICA RECOVERY – PRIORITY MARKETS

+12.7% ▲
Oct-Dec 25 over Oct-Dec 19 monthly average

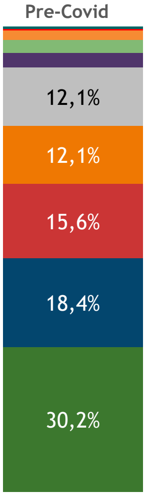
Recent performance across South Africa's key African priority markets reflects sustained gains into the final quarter, with several countries now exceeding their pre-Covid levels. Kenya remains the standout, reaching +113.6% above 2019 in December 2025, alongside Mozambique (+60.6%) and Zambia (+36.6%), all showing strong upward momentum relative to 2024. Namibia (-2.2%) and Zimbabwe (-3.8%) are nearing full recovery but remain slightly below their 2019 positions, while Malawi (-5.4%) and Lesotho (-13.0%) continue to lag. Botswana (-37.4%) remains the weakest performer, indicating persistent under-recovery despite broader regional gains, while Nigeria (+7.5%) and Eswatini (+12.3%) show modest improvements from smaller bases. Overall, the pattern points to continued strengthening led by a few high-growth markets, with uneven recovery across others suggesting that not all regional flows have fully stabilised.

Recovery of Africa Tourist Arrivals vs. Same Month in 2019[2]
Jan. 2020 – Sep. 2025



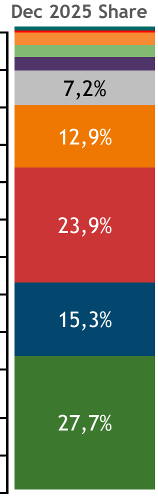
Share of Priority Africa Tourist Arrivals by Country Prior vs. Post Covid-19[2]

Pre-Covid



Pre-Covid Share	Country	Dec-25 Share	Dec-25 Growth
0.4%	Kenya	0.9%	113.6%
0.3%	Nigeria	0.3%	7.5%
2.0%	Zambia	2.7%	36.6%
2.7%	Malawi	2.4%	-5.4%
3.0%	Namibia	2.8%	-2.2%
12.1%	Botswana	7.2%	-37.4%
12.1%	eSwatini	12.9%	12.3%
15.6%	Mozambique	23.9%	60.6%
18.4%	Lesotho	15.3%	-13.0%
30.2%	Zimbabwe	27.7%	-3.8%

Dec 2025 Share



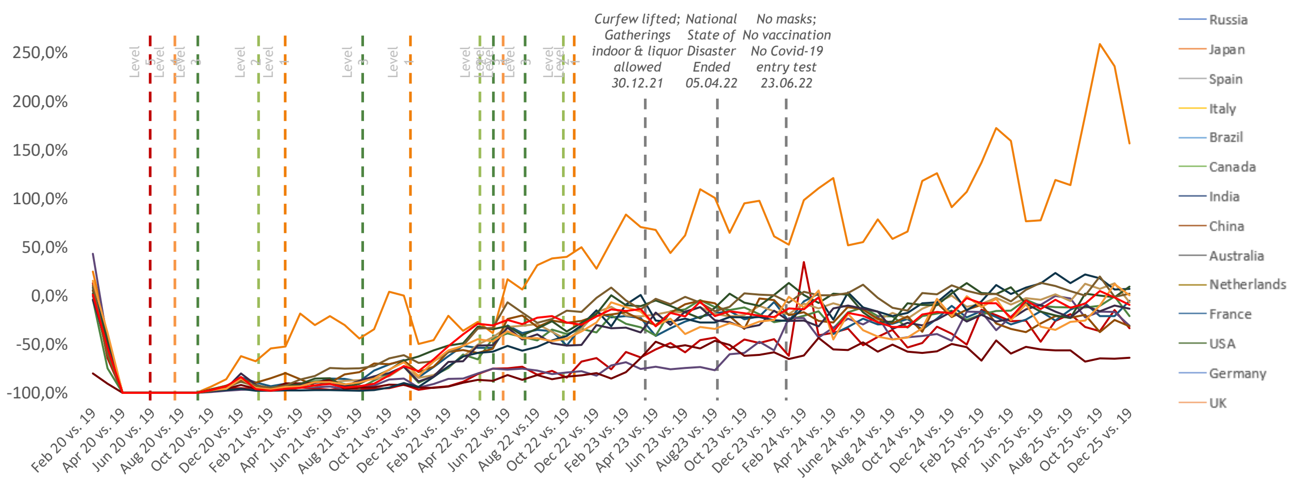
[2] P0350 - International Tourism, October 2025; P0350 - International Tourism, November 2025; P0350 - International Tourism, December 2025

OVERSEAS RECOVERY – PRIORITY MARKETS

-4.3%
Oct-Dec 25 over Oct-Dec 19 monthly average

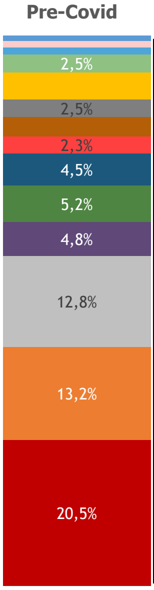
Into Q4 2025, long-haul market performance continues to reflect an uneven return relative to 2019, with gaps narrowing in some areas while persisting in others. Russia remains the standout, with arrivals up +156.4% in December 2025, maintaining a strong lead over all other markets. Australia (+7.0%) and the Netherlands (+9.2%) have also moved ahead of their 2019 levels, while the USA (+2.2%), one of the largest contributors, shows modest but sustained recovery. In contrast, the UK (-9.5%) remains below its pre-pandemic position, alongside Japan (-33.7%) and India (-31.5%), indicating continued softness. China (-63.8%) remains the most constrained major market, with Germany (+0.4%) only just returning to parity and Canada (-7.0%) still lagging. France (-13.6%) and Brazil (-30.8%) also remain in deficit, reinforcing the uneven nature of recovery across both Europe and parts of Asia. Overall, Q4 2025 highlights a recovery led by a small group of outperforming markets, while broader long-haul stabilisation remains incomplete.

Recovery of Overseas Tourist Arrivals vs. Same Month in 2019[2]
Jan. 2020 - Sep. 2025



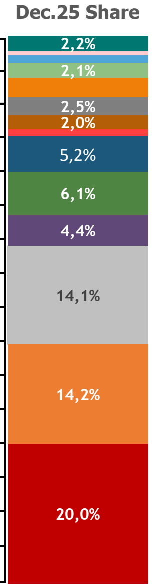
Share of Priority Overseas Tourist Arrivals by Country Prior vs. Post Covid-19[2]

Pre-Covid



Pre-Covid Share	Country		Dec-25 Share	Dec-25 Growth
0.8%	Russia		2.2%	156.4%
0.9%	Japan		0.6%	-33.7%
1.0%	Spain		1.0%	-5.1%
2.5%	Italy		2.1%	-21.0%
3.8%	Brazil		2.8%	-30.8%
2.5%	Canada		2.5%	-7.0%
2.7%	India		2.0%	-31.5%
2.3%	China		0.9%	-63.8%
4.5%	Australia		5.2%	7.0%
5.2%	Netherlands		6.1%	9.2%
4.8%	France		4.4%	-13.6%
12.8%	USA		14.1%	2.2%
13.2%	Germany		14.2%	0.4%
20.5%	UK		20.0%	-9.5%

Dec.25 Share



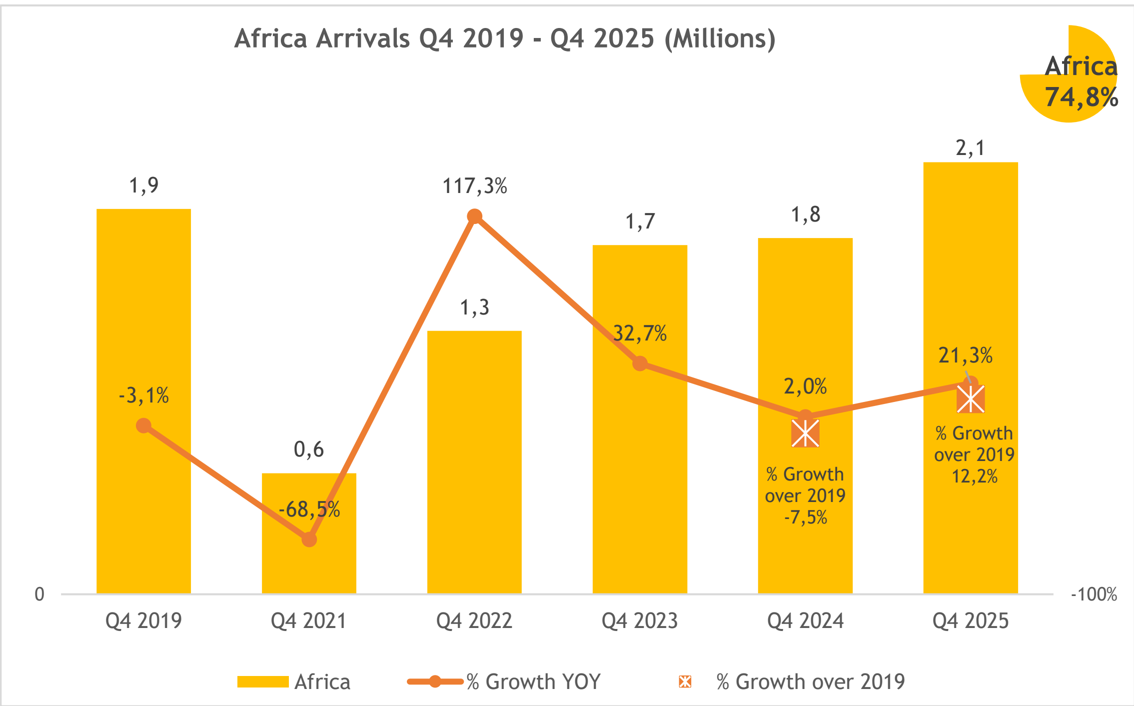
[2] P0350 - International Tourism, October 2025; P0350 - International Tourism, November 2025; P0350 - International Tourism, December 2025

AFRICA ARRIVALS

2.1 M

+21.3%▲
Q4 2025 over Q4 2024

Accounting for 74.8% of inbound flows, Africa continued to lead South Africa's tourism volume performance in Q4 2025, reaching 2.1 million arrivals, up +21.3% on 2024 and +12.2% above 2019. Zimbabwe remained the largest source market with 591 731 arrivals, increasing +15.8% year-on-year and +5.4% relative to 2019. Mozambique delivered the strongest expansion among top markets, lifting its share to 26.0% and growing +40.2% versus 2024 and +69.4% compared to 2019. Lesotho recorded solid gains of +20.6% over 2024, though still below its earlier share, while Eswatini (+18.2%) and Malawi (+0.3%) showed more moderate increases. Zambia (+25.8%) and Kenya (+27.0%) both strengthened further, with Kenya standing out for its significant uplift against 2019. Namibia posted a modest +4.6% rise but remains slightly below its 2019 level, while Angola showed limited growth and continues to trail its earlier position. Overall, Q4 2025 reinforces Africa's dominant role in sustaining inbound growth, with performance driven by a mix of high-volume markets and select high-growth contributors.



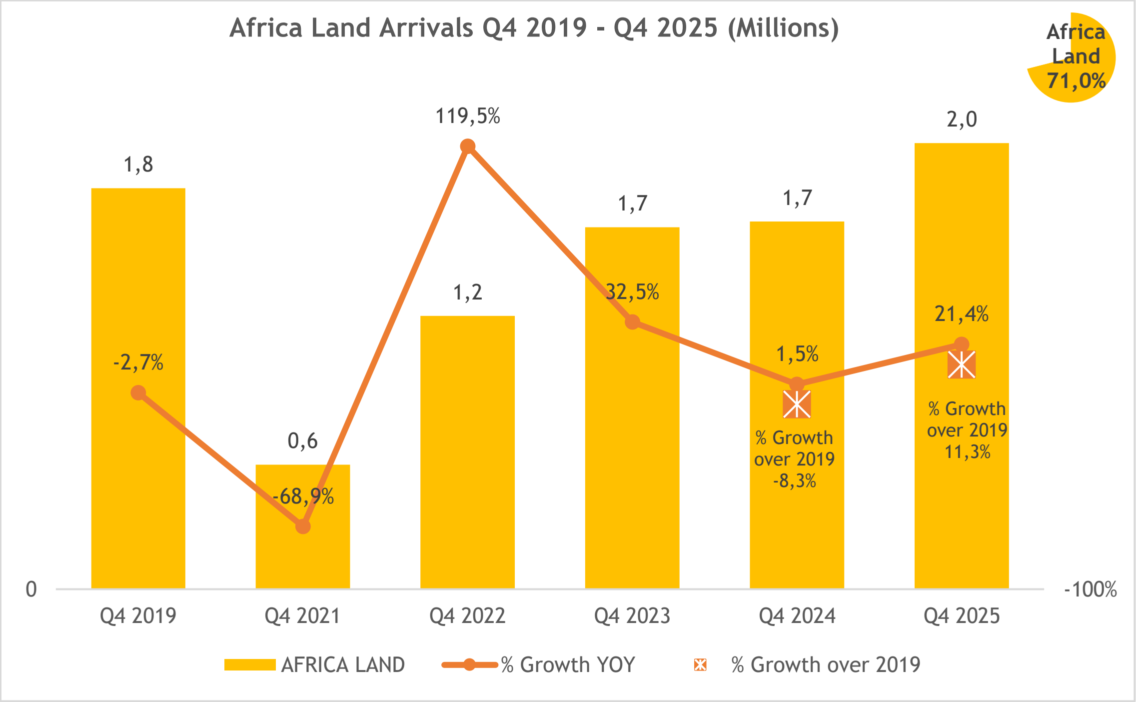
Africa Tourist Arrivals by Top 10 Markets Q4 2025

Africa Top 10 Markets 2025	Tourist Arrivals 2024	Tourist Arrivals 2025	% Share 2019	% Share 2024	% Share 2025	% Growth 2024 - 2025	% Growth 2019 - 2025
Zimbabwe	510 820	591 731	29.4%	28.9%	27.6%	15.8%	5.4%
Mozambique	396 640	556 258	17.2%	22.5%	26.0%	40.2%	69.4%
Lesotho	284 402	343 032	19.0%	16.1%	16.0%	20.6%	-5.5%
eSwatini	224 103	264 910	12.5%	12.7%	12.4%	18.2%	11.0%
Botswana	117 713	123 042	10.2%	6.7%	5.7%	4.5%	-36.9%
Malawi	53 169	53 311	2.8%	3.0%	2.5%	0.3%	1.0%
Zambia	41 410	52 077	2.0%	2.3%	2.4%	25.8%	33.6%
Namibia	47 588	49 797	2.6%	2.7%	2.3%	4.6%	-0.1%
Kenya	15 301	19 435	0.4%	0.9%	0.9%	27.0%	137.5%
Tanzania	11 455	13 938	0.5%	0.6%	0.7%	21.7%	32.9%
All Africa Arrivals	**1 765 660**	**2 141 079**	**71.6%**	**73.8%**	**74.8%**	**21.3%**	**12.2%**
Others in Top 10 in 2019							
Angola	9 680	10 731	0.7%	0.5%	0.5%	10.9%	-24.2%

AFRICA LAND ARRIVALS 2.0 M +21.4%

Q4 2025 over Q4 2024

Land-based travel maintained its leading role at 71.0% in Q4 2025, with Africa Land arrivals reaching 2.0 million, up +21.4% compared to 2024 and +11.3% above 2019, signalling continued strength in cross-border flows. Zimbabwe remained the dominant contributor, accounting for 29.1% of arrivals and growing +15.8% year-on-year, while holding above its 2019 level. Mozambique continued to drive expansion, increasing its share to 27.3% and recording strong gains of +40.2% over 2024 and +69.4% relative to 2019. Lesotho advanced by +20.6% year-on-year, though its share remains slightly below earlier levels, while Eswatini (+18.2%) and Malawi (+0.3%) posted more measured improvements. Zambia (+25.8%) strengthened further and remains well above its 2019 position, while Namibia rose +4.6% but is still marginally below its pre-pandemic level. Botswana (+4.5%) showed only limited recovery and continues to lag its 2019 benchmark. Overall, Q4 2025 underscores the sustained importance of land markets, with growth anchored in high-volume neighbours and supported by consistent cross-border mobility.



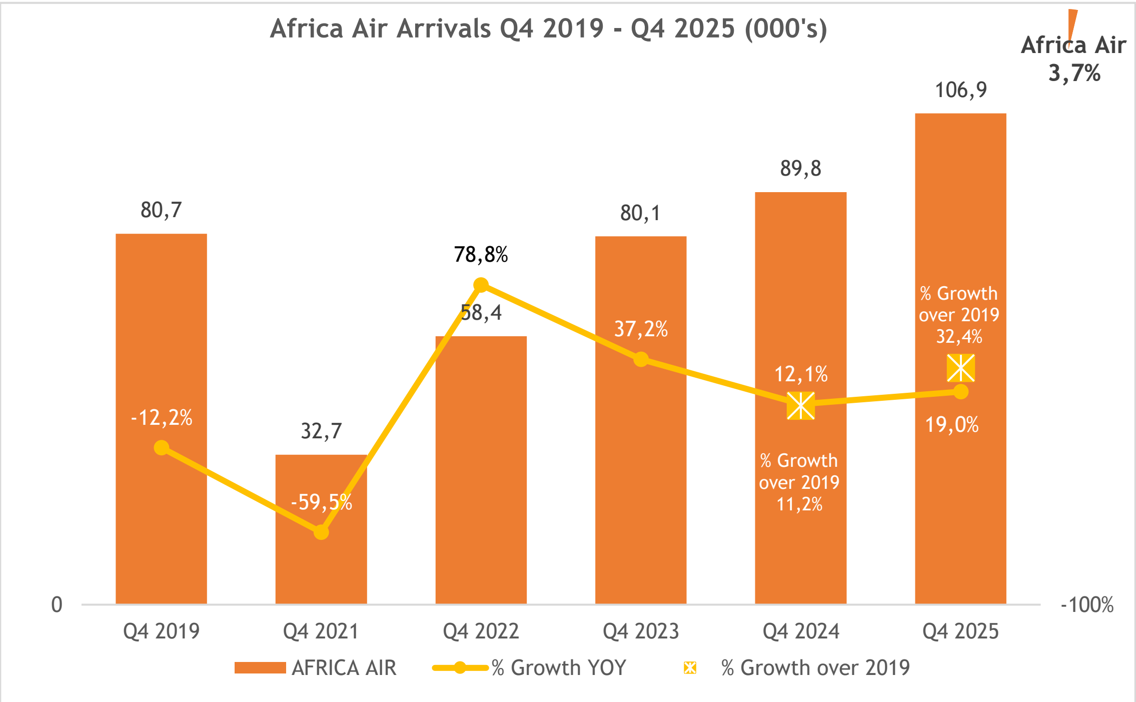
Africa Land Tourist Arrivals by Market Q4 2025

Africa Land Markets 2025	Tourist Arrivals 2024	Tourist Arrivals 2025	% Share 2019	% Share 2024	% Share 2025	% Growth 2024 - 2025	% Growth 2019 - 2025
Zimbabwe	510 820	591 731	30.7%	30.5%	29.1%	15.8%	5.4%
Mozambique	396 640	556 258	18.0%	23.7%	27.3%	40.2%	69.4%
Lesotho	284 402	343 032	19.9%	17.0%	16.9%	20.6%	-5.5%
eSwatini	224 103	264 910	13.1%	13.4%	13.0%	18.2%	11.0%
Botswana	117 713	123 042	10.7%	7.0%	6.0%	4.5%	-36.9%
Malawi	53 169	53 311	2.9%	3.2%	2.6%	0.3%	1.0%
Zambia	41 410	52 077	2.1%	2.5%	2.6%	25.8%	33.6%
Namibia	47 588	49 797	2.7%	2.8%	2.4%	4.6%	-0.1%
All Africa Land Arrivals	**1 675 845**	**2 034 158**	68.6%	70.0%	71.0%	21.4%	11.3%

AFRICA AIR ARRIVALS 106.9 K +19.0%

Q4 2025 over Q4 2024

Air-based arrivals from Africa, at 3.7%, continued to build in Q4 2025, reaching 106.9 thousand, up +19.0% on 2024 and +32.4% above 2019, reflecting sustained recovery in regional air connectivity. Kenya remained the leading market, increasing its share to 18.2% and recording strong gains of +27.0% year-on-year and +137.5% relative to 2019. Ghana also expanded further, rising +12.6% over 2024 and +179.5% compared to pre-pandemic levels, while Tanzania and the DRC maintained steady upward movement. Ethiopia recorded one of the strongest rebounds, up +56.4% versus 2019 alongside continued annual growth, while Mauritius (+16.4%) and Uganda (+19.9%) delivered moderate increases. Nigeria (+24.4%) edged higher and sits slightly above its 2019 level, whereas Angola (-24.2%) and Egypt (-13.5%) remain below earlier benchmarks. Overall, Q4 2025 reflects a strengthening Africa Air segment, with growth concentrated in a group of high-performing markets while others continue to recover.



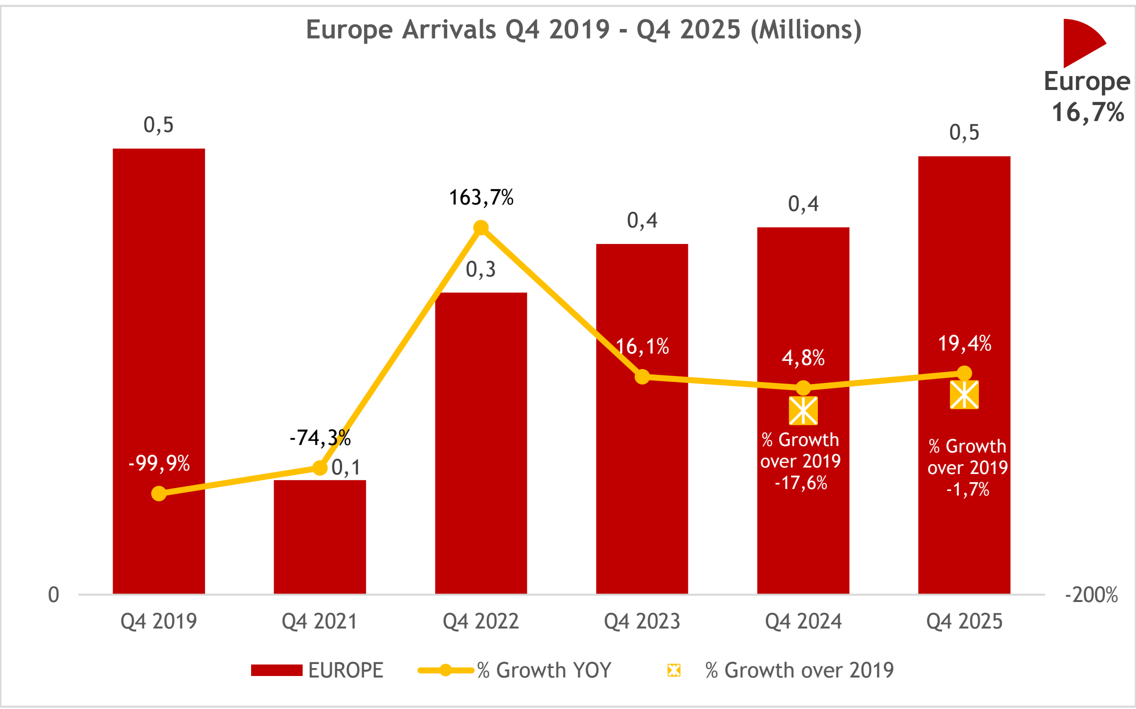
Africa Air Tourist Arrivals by Top 10 Markets Q4 2025

Africa Air Top 10 Markets 2025	Tourist Arrivals 2024	Tourist Arrivals 2025	% Share 2019	% Share 2024	% Share 2025	% Growth 2024 - 2025	% Growth 2019 - 2025
Kenya	15 301	19 435	10.1%	17.0%	18.2%	27.0%	137.5%
Tanzania	11 455	13 938	13.0%	12.8%	13.0%	21.7%	32.9%
Ghana	11 170	12 574	5.6%	12.4%	11.8%	12.6%	179.5%
DRC	8 798	12 511	10.2%	9.8%	11.7%	42.2%	51.3%
Angola	9 680	10 731	17.5%	10.8%	10.0%	10.9%	-24.2%
Nigeria	6 397	7 960	9.4%	7.1%	7.4%	24.4%	5.0%
Mauritius	6 032	7 021	8.1%	6.7%	6.6%	16.4%	6.8%
Uganda	3 987	4 779	5.0%	4.4%	4.5%	19.9%	18.7%
Ethiopia	2 074	3 243	2.0%	2.3%	3.0%	56.4%	102.9%
Egypt	1 560	1 941	2.8%	1.7%	1.8%	24.4%	-13.5%
All Africa Air Arrivals	**89 815**	**106 921**	3.0%	3.8%	3.7%	19.0%	32.4%
Others in Top 10 in 2019							
Seychelles	1 620	1 248	2.1%	1.8%	1.2%	-23.0%	-26.7%

EUROPE ARRIVALS **0.5 Million** **+19.4%**

Q4 2025 over Q4 2024

Growth momentum from Europe strengthened into Q4 2025, with arrivals reaching 478.1 thousand, up +19.4% on 2024, while remaining slightly below 2019 at –1.7%. The UK retained its lead, accounting for 26.5% of arrivals and growing +18.4% year-on-year, followed by Germany at 24.4% with a +24.5% increase and now broadly aligned with its 2019 level. The Netherlands expanded to a 9.3% share after an +8.9% rise, while France contributed 8.7% but continues to lag its pre-pandemic position. Italy (+7.4%) and Spain (+10.4%) posted moderate gains, while Switzerland (+19.1%) recovered further yet remains below its 2019 benchmark. Russia recorded the strongest uplift, increasing +48.5% over 2024 and +212.2% compared to 2019, standing out among all European markets. Overall, Europe's performance reflects near-complete recovery at the aggregate level, though differences across markets show that not all segments have fully regained earlier levels.



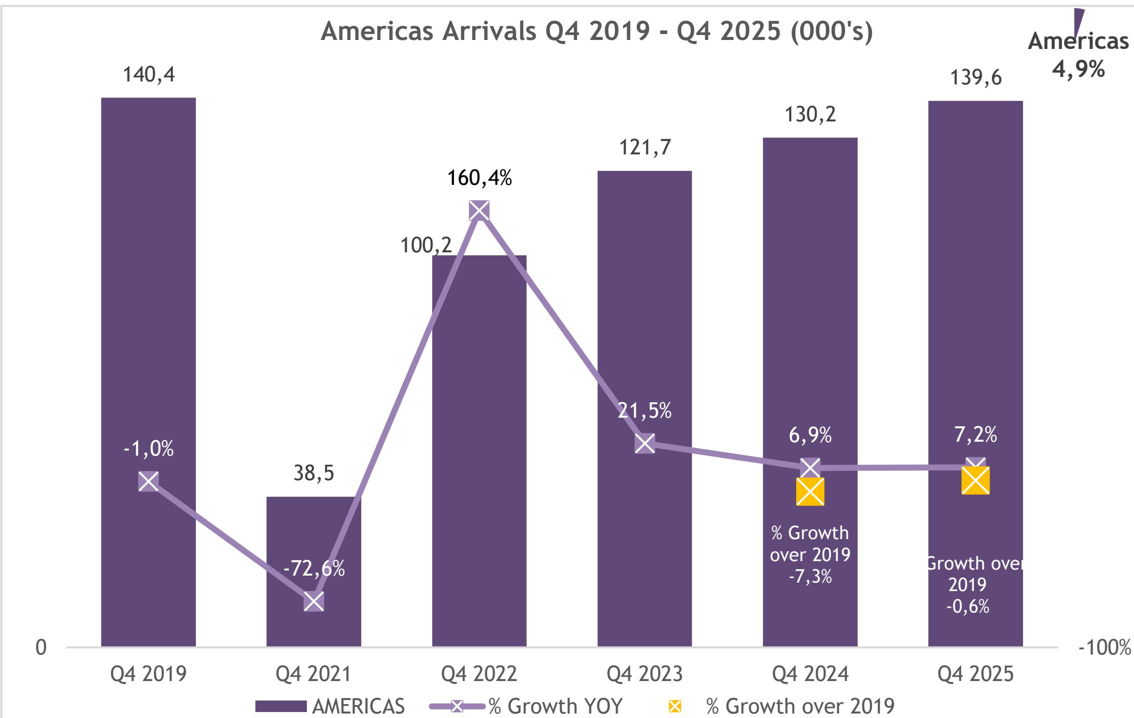
Europe Tourist Arrivals by Top 10 Markets Q4 2025

Europe Top 10 Markets 2025	Tourist Arrivals 2024	Tourist Arrivals 2025	% Share 2019	% Share 2024	% Share 2025	% Growth 2024 - 2025	% Growth 2019 - 2025
UK	107 069	126 770	26.9%	26.7%	26.5%	18.4%	-3.1%
Germany	93 617	116 524	23.8%	23.4%	24.4%	24.5%	0.7%
The Netherlands	40 666	44 265	8.9%	10.2%	9.3%	8.9%	2.4%
France	36 236	41 812	9.9%	9.0%	8.7%	15.4%	-13.4%
Switzerland	15 435	18 384	4.1%	3.9%	3.8%	19.1%	-7.9%
Russian Federation	11 073	16 441	1.1%	2.8%	3.4%	48.5%	212.2%
Belgium	13 999	15 812	3.4%	3.5%	3.3%	13.0%	-3.1%
Italy	12 941	13 895	3.2%	3.2%	2.9%	7.4%	-12.0%
Sweden	9 227	11 310	3.3%	2.3%	2.4%	22.6%	-28.9%
Ireland	8 325	10 169	1.9%	2.1%	2.1%	22.2%	7.7%
All Europe Arrivals	**400 540**	**478 056**	**18.2%**	**16.7%**	**16.7%**	**19.4%**	**-1.7%**
Others in Top 10 in 2019							
Austria	7 847	9 639	2.1%	2.0%	2.0%	22.8%	-5.0%
Spain	7 459	8 236	2.0%	1.9%	1.7%	10.4%	-16.9%

AMERICAS ARRIVALS 139.6 K

+7.2%
Q3 2025 over Q3 2024

Performance from the Americas edged higher into Q4 2025, with arrivals reaching 139.6k, a +7.2% increase on 2024, while remaining broadly in line with 2019 (-0.6%). The United States continued to anchor the region, accounting for 66.8% of arrivals and posting modest growth of +1.3% year-on-year alongside a +6.6% uplift versus 2019. Canada followed with a 14.7% share, increasing +12.0% over 2024 and sitting above its 2019 level, while Brazil strengthened to 12.9% with a +36.0% rise, though still below its pre-pandemic position. Among smaller markets, Argentina (+28.4%), Chile (+26.8%), Peru (+38.4%), and Uruguay (+35.7%) recorded notable annual gains, albeit from lower bases and still trailing 2019 levels. Mexico (+5.7%) and Colombia (+10.7%) also advanced, though both remain below earlier benchmarks, while Jamaica (-9.8%) declined slightly year-on-year despite being above 2019. Overall, Q4 2025 reflects a steady recovery led by North America, with improving contributions from South America, though not all markets have fully returned to pre-pandemic levels.



Americas Tourist Arrivals by Top 10 Markets Q4 2025

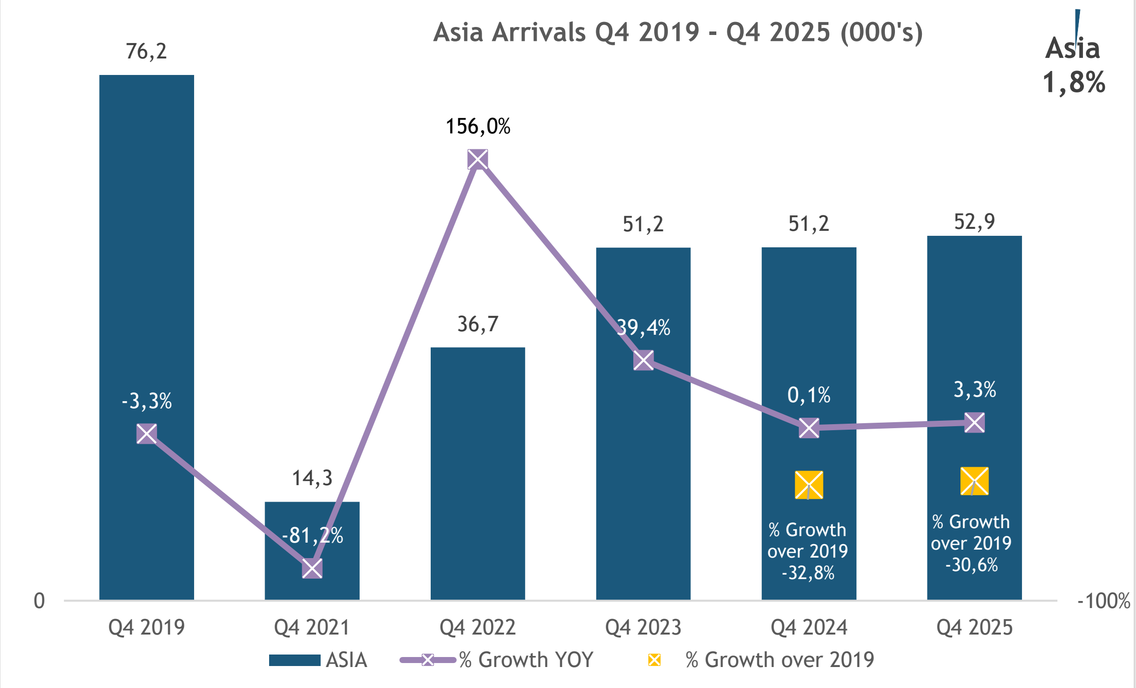
Americas Top 10 Markets 2025	Tourist Arrivals 2024	Tourist Arrivals 2025	% Share 2019	% Share 2024	% Share 2025	% Growth 2024 - 2025	% Growth 2019 - 2025
USA	92 058	93 297	62.4%	70.7%	66.8%	1.3%	6.6%
Canada	18 325	20 524	14.0%	14.1%	14.7%	12.0%	4.1%
Brazil	13 271	18 045	16.6%	10.2%	12.9%	36.0%	-22.6%
Argentina	1 271	1 632	2.0%	1.0%	1.2%	28.4%	-40.8%
Mexico	1 226	1 296	1.0%	0.9%	0.9%	5.7%	-10.1%
Chile	714	905	0.8%	0.5%	0.6%	26.8%	-23.2%
Peru	440	609	0.9%	0.3%	0.4%	38.4%	-51.9%
Colombia	476	527	0.5%	0.4%	0.4%	10.7%	-26.3%
Uruguay	224	304	0.3%	0.2%	0.2%	35.7%	-28.5%
Jamaica	326	294	0.2%	0.3%	0.2%	-9.8%	32.4%
All Americas Arrivals	130 165	139 568	5.3%	5.4%	4.9%	7.2%	-0.6%
Others in Top 10 in 2019							

ASIA ARRIVALS

52.9 K **+3.3%** ▲

Q3 2025 over Q3 2024

Asia's recovery remains measured in Q4 2025, with arrivals reaching 52.9 thousand, a modest +3.3% increase on 2024, while still trailing 2019 by -30.6%. India continues to anchor the region with a 29.4% share, though arrivals declined by -11.3% year-on-year and remain well below pre-pandemic levels (-31.8%). China follows with a reduced share and remains the weakest performer, down -64.5% versus 2019 and -19.3% compared to 2024. In contrast, several secondary markets showed stronger progress, with Pakistan up +53.2% against 2019 and Bangladesh rising +68.7%, both supported by solid annual gains. Japan increased +19.3% year-on-year but remains below its 2019 position, while Singapore (+14.0%) and Malaysia (+1.8%) recorded more moderate improvements. South Korea (+21.8%) and Thailand (+21.7%) strengthened over 2024, though both continue to lag their earlier benchmarks. Overall, Q4 2025 reflects a gradual improvement across Asia, with recovery concentrated in a subset of markets while the broader region remains below pre-pandemic levels.



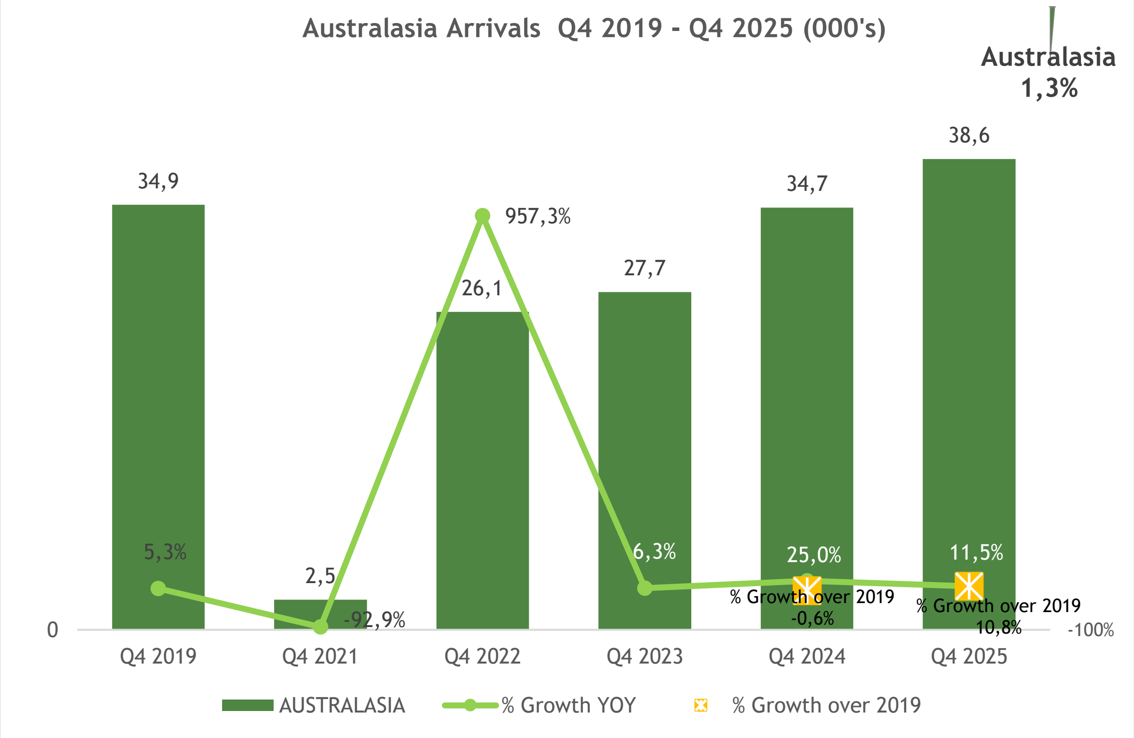
Asia Tourist Arrivals by Top 10 Markets Q4 2025

Asia Top 10 Markets 2025	Tourist Arrivals 2024	Tourist Arrivals 2025	% Share 2019	% Share 2024	% Share 2025	% Growth 2024 - 2025	% Growth 2019 - 2025
India	17 549	15 559	29.9%	34.3%	29.4%	-11.3%	-31.8%
China	9 842	7 943	29.3%	19.2	15	-19.3%	-64.5%
Japan	4 471	5 334	10.0%	8.7%	10.1%	19.3%	-30.2%
Pakistan	3 675	4 942	4.2%	7.2%	9.3%	34.5%	53.2%
South Korea	3 055	3 722	5.5%	6.0%	7.0%	21.8%	-10.4%
Bangladesh	1 454	2 546	2.0%	2.8%	4.8%	75.1%	68.7%
Singapore	2 199	2 506	3.8%	4.3%	4.7%	14.0%	-13.1%
Malaysia	1 898	1 933	2.5%	3.7%	3.7%	1.8%	0.8%
Philippines	1 581	1 932	2.6%	3.1%	3.7%	22.2%	-2.4%
Thailand	1 296	1 577	2.9%	2.5%	3.0%	21.7%	-28.5%
All Asia Arrivals	**51 211**	**52 916**	**2.9%**	**2.1%**	**1.8%**	**3.3%**	**-30.6%**
Others in Top 10 in 2019							
Taiwan	1 192	896	2.2%	2.3%	1.7%	-24.8%	-46.9%

AUSTRALASIA ARRIVALS 38.6 K

+11.5%
Q3 2025 over Q4 2024

Australasia continued to advance in Q4 2025, with arrivals reaching 38.6 thousand, up +11.5% on 2024 and +10.8% above 2019, maintaining its position among the stronger recovering long-haul regions. Australia remained overwhelmingly dominant, accounting for 83.1% of arrivals, supported by growth of +12.7% year-on-year and +10.1% relative to 2019. New Zealand followed with a 16.8% share, increasing +7.2% over 2024 and exceeding its pre-pandemic level by +14.8%. Smaller markets such as Fiji and Papua New Guinea contributed marginally, with both declining year-on-year (-40.9% and -38.9% respectively), though Papua New Guinea remains above its 2019 level. Overall, Australasia's performance continues to be driven almost entirely by Australia and New Zealand, which together account for nearly all arrivals—highlighting a highly concentrated but stable recovery profile.



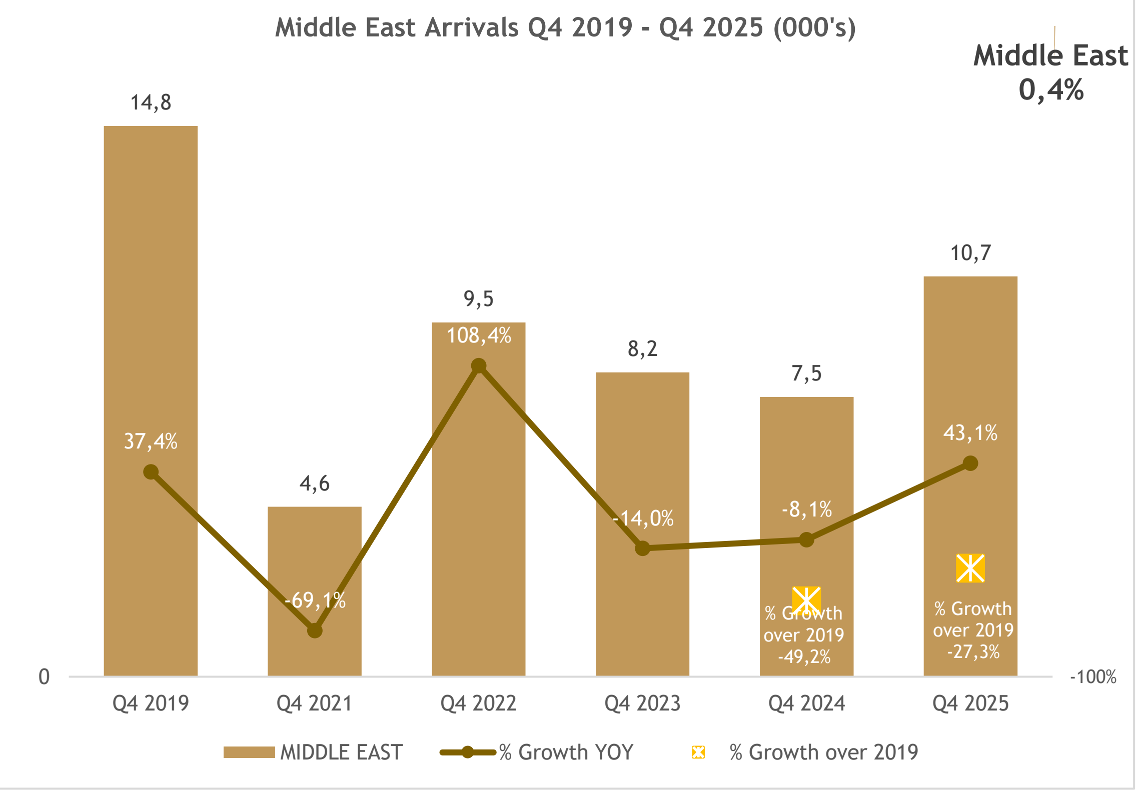
Australasia Tourist Arrivals by Market Q4 2025

Australasia Top 4 Markets 2025	Tourist Arrivals 2024	Tourist Arrivals 2025	% Share 2019	% Share 2024	% Share 2025	% Growth 2024 - 2025	% Growth 2019 - 2025
Australia	28 483	32 090	83.6%	82.2%	83.1%	12.7%	10.1%
New Zealand	6 036	6 473	16.2%	17.4%	16.8%	7.2%	14.8%
Fiji	88	52	0.2%	0.3%	0.1%	-40.9%	-3.7%
Papua New Guinea	18	11	0.0%	0.1%	0.0%	-38.9%	37.5%
All Australasia Arrivals	**34 657**	**38 635**	1.3%	1.4%	1.3%	11.5%	10.8%

MIDDLE EAST ARRIVALS 10.7 K +43.1%

Q4 2025 over Q4 2024

Growth from the Middle East strengthened into Q4 2025, with arrivals reaching 10.7 thousand, up +43.1% on 2024, though still -27.3% below 2019 and representing a small share of total arrivals. Saudi Arabia led the region, accounting for 35.3% of arrivals and recording strong gains of +32.3% year-on-year and +78.0% relative to 2019. Israel followed with a 23.4% share but remains significantly below its 2019 level (-73.3%) despite a +42.4% increase over 2024. The United Arab Emirates expanded to 7.5% and posted one of the strongest annual increases at +75.5%, alongside solid long-term growth. Other markets, including Qatar (+126.8%), Palestine (+135.9%), and Jordan (+22.5%), delivered notable gains, while smaller contributors such as Yemen and Syria also increased from low bases. Overall, Q4 2025 reflects improving performance from the Middle East, though recovery remains uneven and continues to rely on a handful of faster-growing markets.



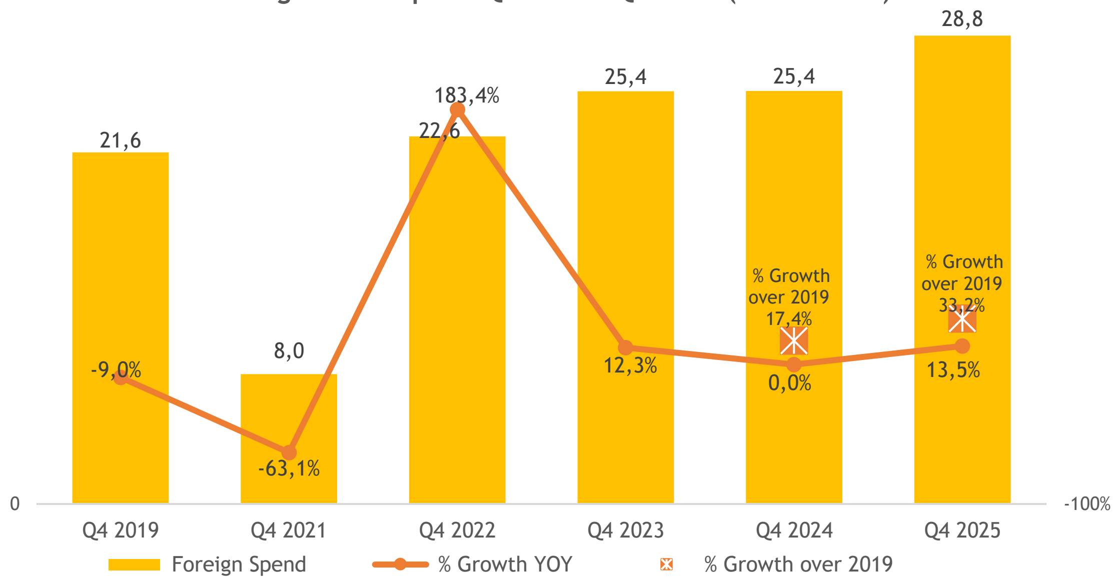
Middle East Tourist Arrivals by Top 10 Markets Q4 2025

Middle East Top 10 Markets 2025	Tourist Arrivals 2024	Tourist Arrivals 2025	% Share 2019	% Share 2024	% Share 2025	% Growth 2024 - 2025	% Growth 2019 - 2025
Saudi Arabia	2 864	3 788	14.4%	38.2%	35.3%	32.3%	78.0%
Israel	1 767	2 516	63.8%	23.6%	23.4%	42.4%	-73.3%
United Arab Emirates	461	809	3.4%	6.1%	7.5%	75.5%	59.3%
Lebanon	589	788	5.0%	7.9%	7.3%	33.8%	7.7%
Jordan	577	707	4.1%	7.7%	6.6%	22.5%	17.6%
Iran, Islamic Rep.	439	507	2.9%	5.9%	4.7%	15.5%	19.0%
Palestine	209	493	0.5%	2.8%	4.6%	135.9%	584.7%
Qatar	123	279	1.4%	1.6%	2.6%	126.8%	39.5%
Syrian Arab Republic	123	185	1.2%	1.6%	1.7%	50.4%	0.5%
Yemen	123	177	1.3%	1.6%	1.6%	43.9%	-5.9%
All Middle East Arrivals	**7 500**	**10 732**	0.6%	0.3%	0.4%	**43.1%**	**-27.3%**
Others in Top 10 in 2019							
Oman	32	154	0.8%	0.4%	1.4%	381.3%	36.3%

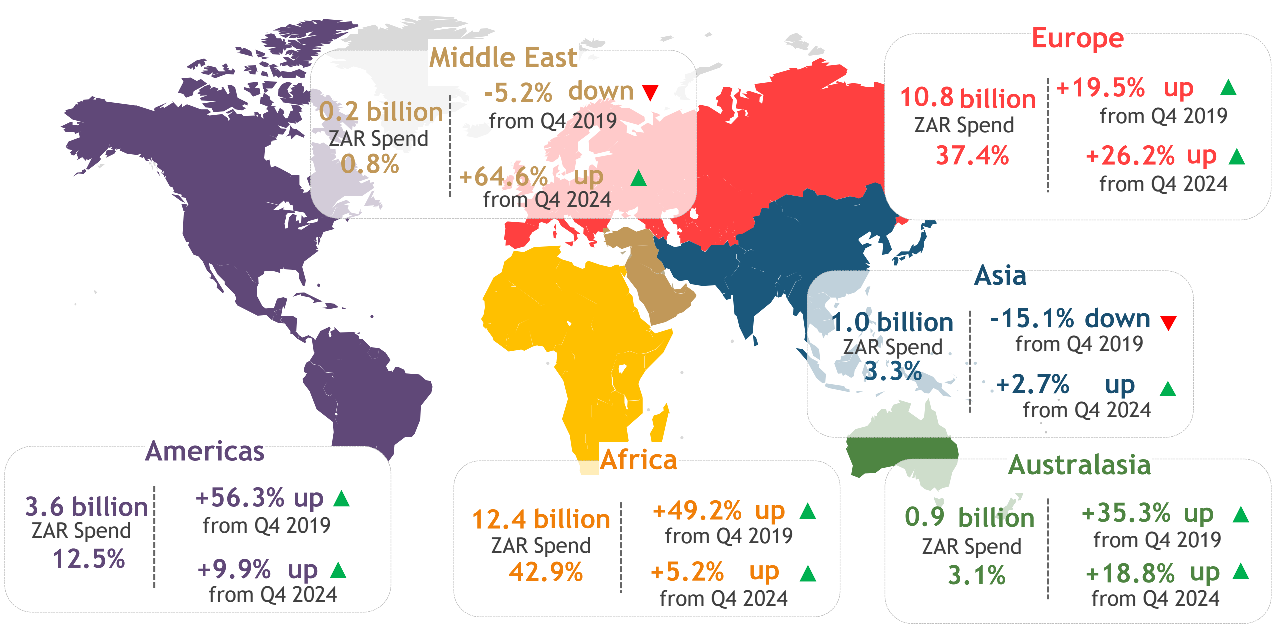
TOTAL FOREIGN DIRECT SPEND | **ZAR 28.8 BILLION** | **+13.5%** ▲

Stronger spending outcomes emerged in Q4 2025, with Foreign Direct Spend reaching ZAR 28.8 billion, up +13.5% on 2024 and +33.2% above 2019, marking one of the highest fourth-quarter levels recorded. Africa contributed ZAR 12.4 billion (42.9% share), increasing +5.2% year-on-year and +49.2% relative to 2019, while Overseas markets generated ZAR 16.5 billion, lifting their share to 57.1% from 53.7% in 2024. Europe (ZAR 10.8 billion) rose +26.2% on 2024 and sits above its 2019 level, while the Americas (ZAR 3.6 billion) increased +9.9% year-on-year and remains well ahead of pre-pandemic spend. Australasia (ZAR 0.9 billion) grew +18.8% on 2024 and is also above 2019, whereas Asia (ZAR 1.0 billion) recorded only a +2.7% increase and remains below its earlier benchmark. The Middle East (ZAR 0.2 billion) expanded sharply by +64.6% year-on-year but continues to trail its 2019 level. Overall, Q4 2025 reflects strong spend growth led by Overseas markets, with Africa remaining central but gradually being overtaken by faster gains from long-haul contributors.

Foreign Direct Spend Q4 2019 - Q4 2025 (ZAR Billions)



Foreign Direct Spend by Region Q4 2025
(ZAR Billions, Share & Growth Q4 2025 vs. Q4 2019 & Q4 2025 vs. Q4 2024)



TOTAL FOREIGN DIRECT SPEND **ZAR 28.8 BILLION** +13.5%

A widening gap between volume and value is evident in Q4 2025, with Africa accounting for 74.8% of arrivals while contributing 42.9% of total spend, led by Africa Land at 71.0% of arrivals but only 36.4% of spend. This results in a relatively low spend-to-arrivals ratio of 57.4% for the continent, and 51.3% for land-based travellers in particular. In contrast, overseas markets represent just 25.2% of arrivals yet generate 57.1% of spend, translating into a markedly higher ratio of 226.2%. Among these, the Americas (257.4%) and Europe (223.8%) stand out for strong spend intensity, while Australasia (229.2%) also performs well relative to its size. Asia (179.8%) and the Middle East (210.6%) maintain elevated ratios despite smaller shares, reflecting higher per-visitor expenditure. Africa Air, at 112.8%, continues to outperform land-based travel, though it remains below long-haul levels. Overall, Q4 2025 reinforces the gap between high-volume regional flows and higher-spending long-haul markets, with implications for how growth translates into value.

Spend & Ratios by Region Q4 2025

Region	% of Arrivals Q4 2025	% of Spend Q4 2025	Ratio % Spend : % Arrivals
Africa	74.8%	42.9%	57.4%
Africa Land	71.0%	36.4%	51.3%
Africa Air	3.7%	6.5%	172.8%
Overseas	25.2%	57.1%	226.2%
Europe	16.7%	37.4%	223.8%
Americas	4.9%	12.5%	257.4%
Asia	1.8%	3.3%	179.8%
Australasia	1.3%	3.1%	229.2%
Middle East	0.4%	0.8%	210.6%

Spending composition in Q4 2025 shows continued expansion across most categories, supporting overall TFDS growth of +13.5% compared to 2024. Leisure (+32.1%), Accommodation (+18.9%), and Medical (+81.2%) recorded the strongest year-on-year increases, while Food & Beverages (+14.0%) and Personal Shopping (+14.0%) also advanced steadily. Relative to 2019, Personal Shopping (+49.1%) and Leisure (+44.7%) delivered the largest gains, alongside Food & Beverages (+23.8%), offsetting weaker performance in Accommodation (-2.0%). Business Shopping remains above its 2019 level (+25.4%) despite a decline of -13.1% from 2024, while Transport (+10.5%) continues to grow at a more moderate pace. Overall, Q4 2025 spending stands well above pre-pandemic levels (+33.2%), with growth anchored in consumer-led categories and supported by strong gains across higher-value segments.

Spend by Categories Q4 2025

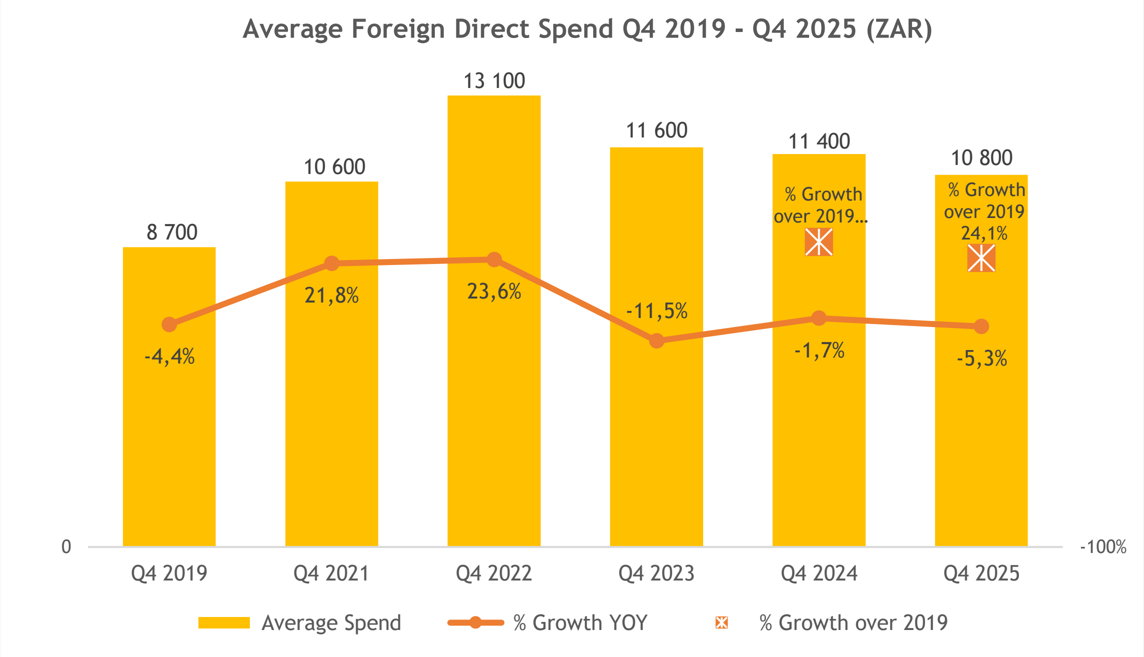
Spend Category	ZAR Billions Q4 2019	ZAR Billions Q4 2024	ZAR Billions Q4 2025	% Share Q4 2019	% Share Q4 2024	% Share Q4 2025	% Growth Q4 2019-Q4 2025	% Growth Q4 2024-Q4 2025
Personal Shopping	6.0	7.9	9.0	27.8%	31.0%	31.1%	49.1%	14.0%
Food & Beverages	4.2	4.5	5.2	19.3%	17.9%	17.9%	23.8%	14.0%
Leisure	2.7	3.0	3.9	12.5%	11.7%	13.6%	44.7%	32.1%
Accommodation	3.5	2.9	3.5	16.3%	11.4%	12.0%	-2.0%	18.9%
Business Shopping	1.9	2.7	2.3	8.6%	10.6%	8.1%	25.4%	-13.1%
Transport	2.2	2.2	2.4	10.2%	8.7%	8.5%	10.5%	10.2%
Medical	0.2	0.2	0.4	0.8%	0.9%	1.5%	160.2%	81.2%
All Types	21.6	25.4	28.8	100.0%	100.0%	100.0%	33.2%	13.5%

MEAN FOREIGN DIRECT SPEND

ZAR 10 800

-5.3%

Average foreign direct spend moderated to ZAR 10 800 in Q4 2025, reflecting a -5.3% decline from 2024 while remaining +24.1% above 2019. This moderation occurred in a period when the rand appreciated sharply toward year-end, reducing foreign tourists' purchasing power as South Africa became relatively more expensive. At the same time, a higher share of VFR-type travel, which is typically associated with lower discretionary expenditure, likely weighed further on average spend. Regional trends diverged, with Europe (+3.8%), Australasia (+3.5%), and the Middle East (+14.5%) recording increases over 2024, while Africa (-12.9%), Africa Land (-11.3%), and Africa Air (-16.9%) declined. The Americas remained broadly stable (+0.4%), and Asia showed no change year-on-year (0.0%). Compared to 2019, all regions are above their earlier levels, led by the Americas (+41.8%), the Middle East (+38.1%), and Africa (+35.6%), highlighting sustained gains in per-visitor spend. Europe (+18.8%), Asia (+25.9%), and Australasia (+17.2%) also remain ahead of their 2019 benchmarks. The Middle East recorded the highest average spend at ZAR 26 800, while Africa Land, at ZAR 5 500, continues to reflect the lowest per-visitor spend profile. Overall, Q4 2025 reflects a slight pullback from 2024 highs, with exchange-rate appreciation and VFR-driven shifts amplifying the uneven changes across regions.



Average Foreign Direct Spend by Region Q4 2019 - Q4 2025

Region	Average Spend (ZAR) Q4 2019	Q4 2024	Q4 2025	% Growth Q4 2019-Q4 2025	% Growth Q4 2024-Q4 2025
Africa	4 500	7 000	6 100	35.6%	-12.9%
Africa Land	4 000	6 200	5 500	37.5%	-11.3%
Africa Air	18 600	24 900	20 700	11.3%	-16.9%
Europe	20 800	23 800	24 700	18.8%	3.8%
Americas	19 600	27 700	27 800	41.8%	0.4%
Asia	17 400	21 900	21 900	25.9%	0.0%
Australasia	20 400	23 100	23 900	17.2%	3.5%
Middle East	19 400	23 400	26 800	38.1%	14.5%
All Arrivals	8 700	11 400	10 800	24.1%	-5.3%

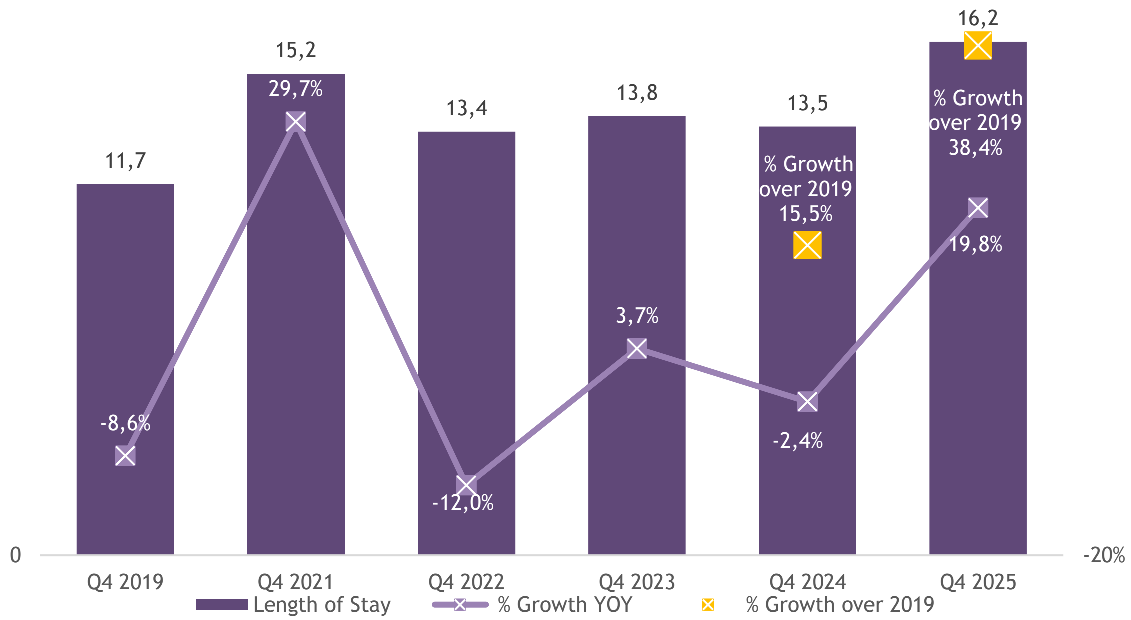
LENGTH OF STAY

16.2 NIGHTS

+19.8%

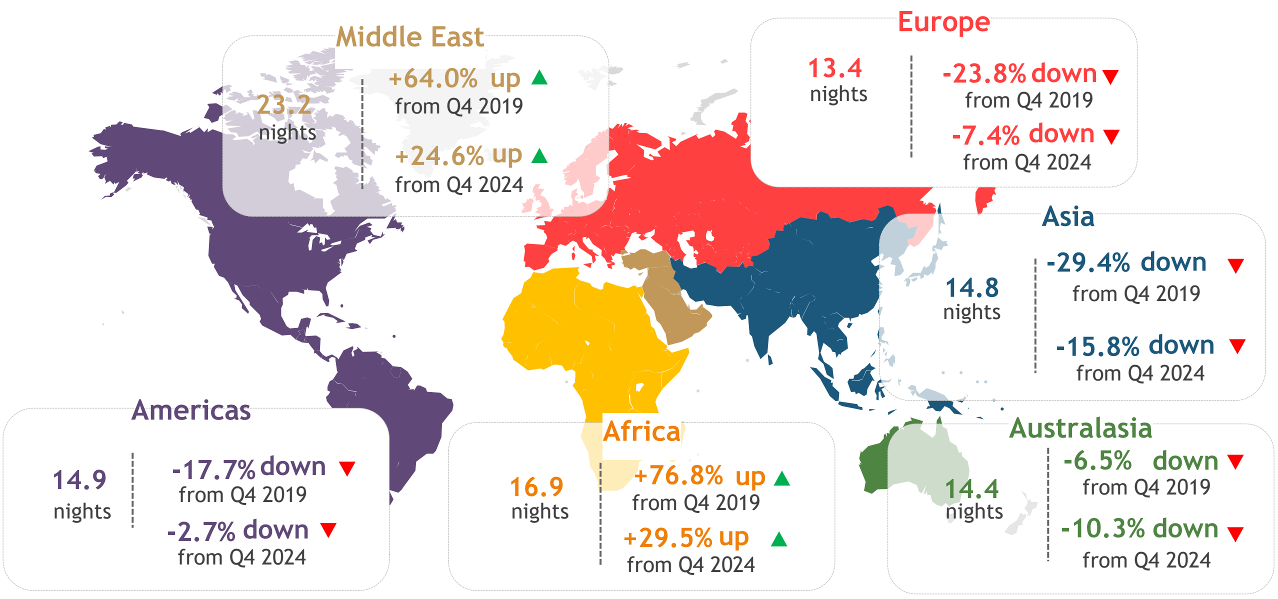
Extended trip durations define Q4 2025, with the average length of stay rising to 16.2 nights, up +19.8% on 2024 and +38.4% above 2019. Unlike its pre-2019 and 2024 positioning, Africa has moved into the leading group, recording 16.9 nights and now exceeding the overall average as well as most long-haul markets. The Middle East remains the highest at 23.2 nights, supported by gains of +24.6% year-on-year and +64.0% versus 2019. Asia follows at 14.8 nights, remaining below its 2019 level (-29.4%) and declining further from 2024 (-15.8%). Europe (-7.4%) and Australasia (-10.3%) also recorded declines compared to 2024, while Africa Air (-10.7%) and the Americas (-2.7%) showed more moderate pullbacks. Overall, Q4 2025 reflects a shift in stay patterns, with Africa emerging as a longer-stay segment alongside the Middle East, with longer durations helping sustain overall spend despite softer per-visitor expenditure.

Length of Stay Q4 2019 - Q4 2025 (nights)



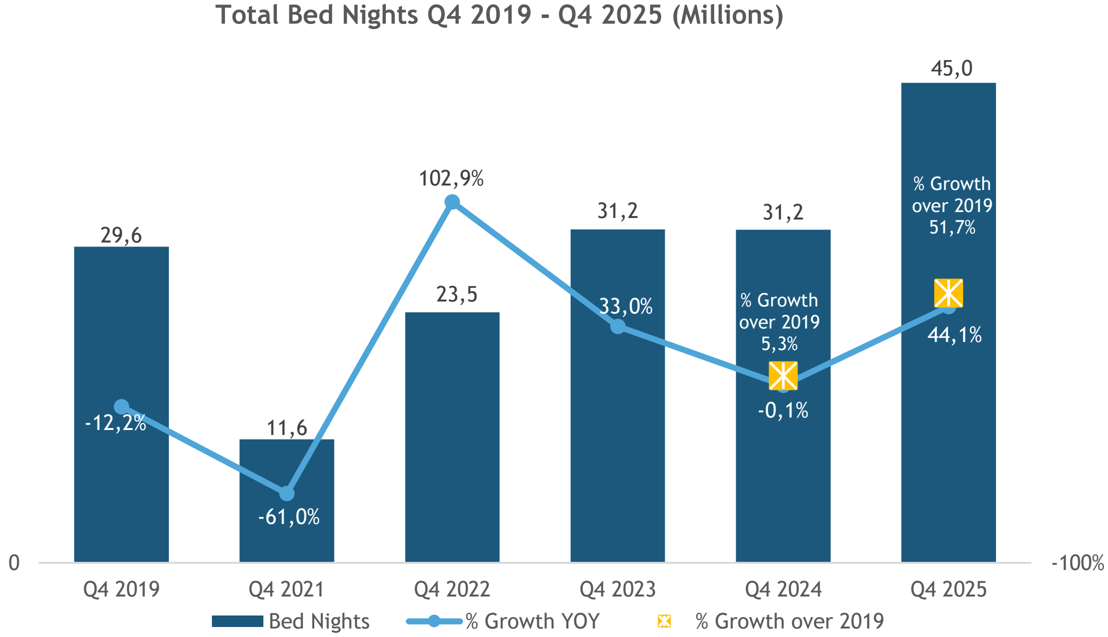
Length of Stay Q4 2025

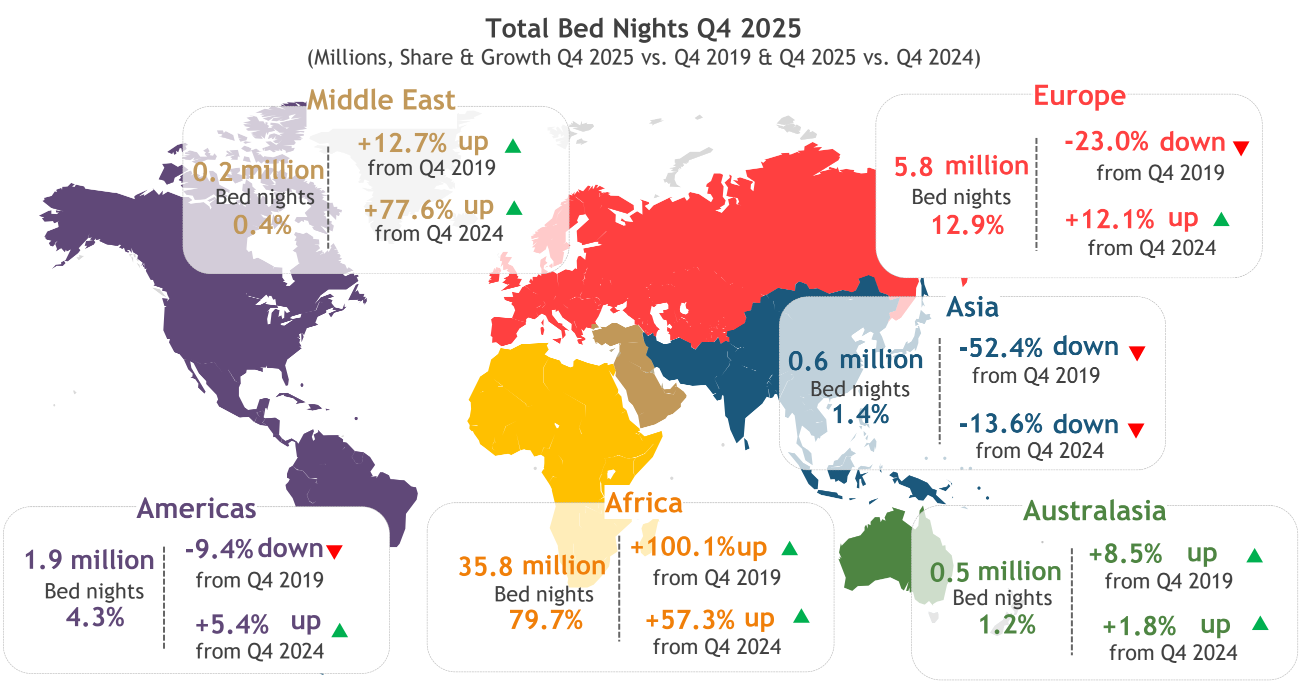
(No. Nights & Growth Q4 2025 vs. Q4 2019 & Q4 2025 vs. Q4 2024)



TOTAL BED NIGHTS | **45.0 MILLION** | **+44.1%**

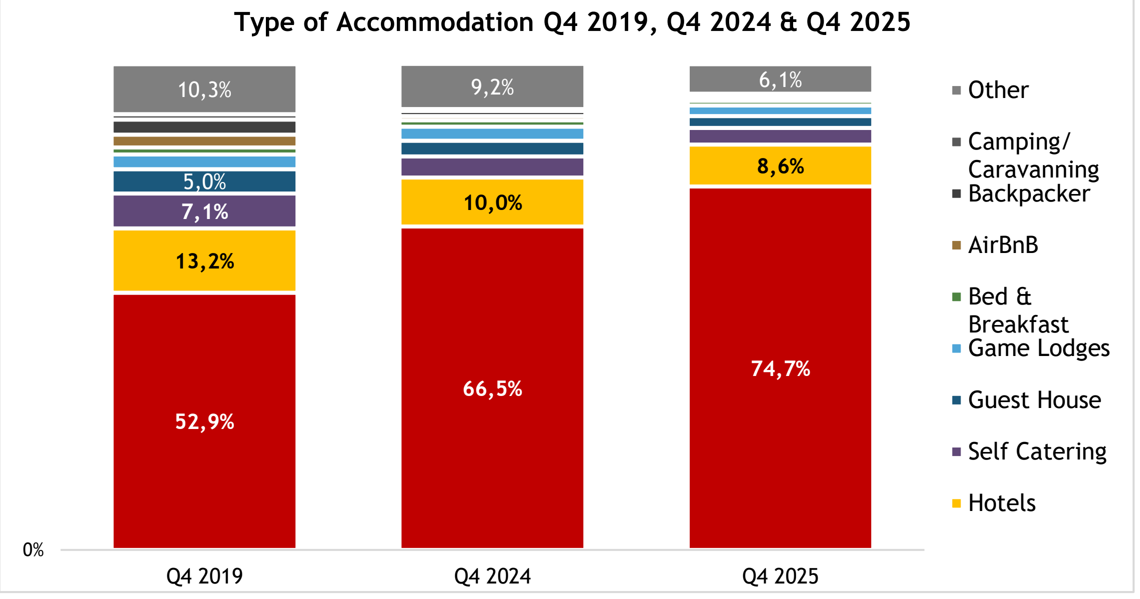
Total bed nights expanded strongly in Q4 2025, reaching 45.0 million, up +44.1% on 2024 and +51.7% above 2019, though this marks a moderation from the sharper +63.1% increase recorded in the previous quarter. Africa dominated with 35.8 million bed nights (79.7% share), increasing +57.3% year-on-year and more than doubling its 2019 level (+100.1%). Europe contributed 5.8 million (12.9% share), rising +12.1% on 2024, though still below 2019 (-23.0%). The Americas reached 1.9 million, up +5.4% year-on-year but remaining slightly below 2019 (-9.4%). Asia declined to 0.6 million (-13.6% vs 2024; -52.4% vs 2019), while the Middle East grew to 0.2 million (+77.6% vs 2024; +12.7% vs 2019). Australasia remained stable at 0.5 million, reflecting modest growth over both 2024 (+1.8%) and 2019 (+8.5%). Overall, Q4 2025 reflects continued expansion in total nights, albeit at a slower pace, with Africa remaining the primary driver of aggregate volume.

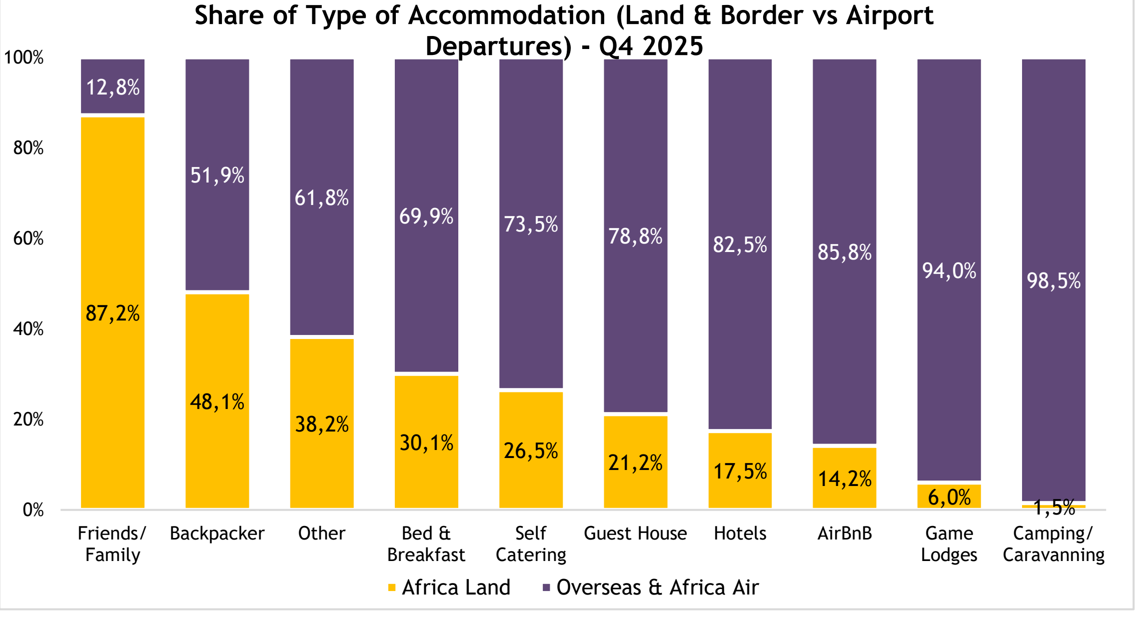




TOTAL BED NIGHTS 45.0 MILLION +44.1%

Dominance of ‘friends and family’ accommodation strengthened further in Q4 2025, accounting for 74.7% of all stays, up from 66.5% in 2024 and well above 52.9% in 2019. This shift reflects the continued prominence of lower-cost accommodation choices, particularly among high-volume land arrivals. Hotel usage declined to 8.6%, down from 13.2% in 2019, while self-catering also eased to 3.4%, reinforcing reduced reliance on formal paid accommodation. Guest houses (2.4%) and game lodges (2.2%) remained limited, with AirBnB (0.5%) and backpackers (0.5%) accounting for only small shares. Among land travellers, 87.2% stayed with friends and family, while air arrivals showed significantly higher participation in paid accommodation, including hotels (82.5%), game lodges (94.0%), and self-catering (73.5%). These differences highlight how travel mode shapes accommodation choice, with air travellers contributing more directly to the formal accommodation sector. Overall, Q4 2025 reflects a continued skew toward informal accommodation, with implications for how growth translates into commercial lodging demand.

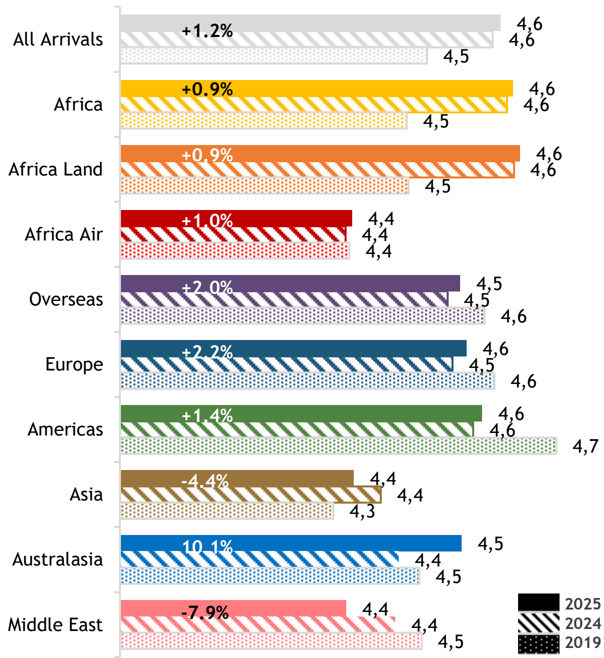




SATISFACTION RATING* **4.6** **+1.2%**

Overall satisfaction held at 4.6 in Q4 2025, reflecting a marginal improvement on 2024 (+1.2%), with 2019 comparisons remaining secondary (+2.6%). Africa Land matched this level at 4.6, showing a slight uplift versus 2024 (+0.9%) while continuing to sit above its 2019 position. Africa Air remained at 4.4, with a modest year-on-year improvement (+1.0%). Among overseas markets, Europe edged up to 4.6 (+2.2% vs 2024), while the Americas also held at 4.6 with a mild increase (+1.4%). Asia remained at 4.4 but softened relative to 2024 (-4.4%), whereas Australasia improved to 4.5, recording the strongest gain (+10.1%). The Middle East held at 4.4 but registered the sharpest decline from 2024 (-7.9%). Overall, Q4 2025 reflects broadly stable satisfaction levels, with incremental gains in several markets offset by softness in others.

Overall Satisfaction Q4 2019, Q4 2024 & Q4 2025



Across Q4 2025, natural attractions remained the highest-rated aspect of the visitor experience, with most long-haul markets: Europe, the Americas, Australasia, and the Middle East, scoring this attribute at 4.8, while Asia followed closely at 4.7. Strong sentiment also extended to people-related and value perceptions, with overseas visitors rating friendly people at 4.8 and value for money consistently high at 4.7 across key markets. In contrast, safety and security continued to lag, averaging 4.1 overall and declining further across several long-haul markets, including 3.9 in Europe and Overseas, 3.8 in Asia, and a low of 3.6 in the Middle East. Road infrastructure reflected a similar pattern, with subdued ratings from Overseas (3.9), Europe (3.9), and particularly Australasia (3.6). Despite these constraints, consistently strong scores across core experience drivers such as natural appeal and interpersonal interactions continue to sustain high overall satisfaction levels.

	All Arrivals	Africa	Africa Land	Africa Air	Overseas	Europe	Americas	Asia	Australasia	Middle East
Overall satisfaction	4.6	4.6	4.6	4.4	4.5	4.6	4.6	4.4	4.5	4.4
Natural Attractions	4.7	4.6	4.6	4.5	4.8	4.8	4.8	4.7	4.8	4.8
Accommodation	4.5	4.4	4.4	4.5	4.6	4.6	4.7	4.5	4.6	4.6
Immigration	4.5	4.5	4.5	4.4	4.5	4.5	4.5	4.4	4.4	4.4
Customs	4.5	4.5	4.5	4.4	4.5	4.5	4.5	4.4	4.3	4.4
Public Transportation	4.4	4.4	4.4	4.2	4.3	4.4	4.3	4.2	4.1	4.3
Friendly People	4.5	4.4	4.4	4.3	4.8	4.8	4.8	4.6	4.7	4.7
Value for Money	4.4	4.4	4.4	4.3	4.7	4.7	4.7	4.4	4.6	4.5
Safety & Security	4.1	4.1	4.1	3.9	3.9	3.9	4.0	3.8	3.9	3.6
South Africa Police Services	4.4	4.4	4.4	4.2	4.3	4.3	4.3	4.1	4.0	4.0
Roads	4.3	4.4	4.4	4.4	3.9	3.9	4.0	4.1	3.6	3.8
Water	4.4	4.4	4.4	4.4	4.2	4.2	4.3	4.2	4.2	4.1
Mobile phone and Internet network	4.5	4.6	4.6	4.4	4.3	4.3	4.4	4.3	4.4	4.2
Electricity	4.5	4.5	4.5	4.4	4.4	4.4	4.4	4.3	4.4	4.3

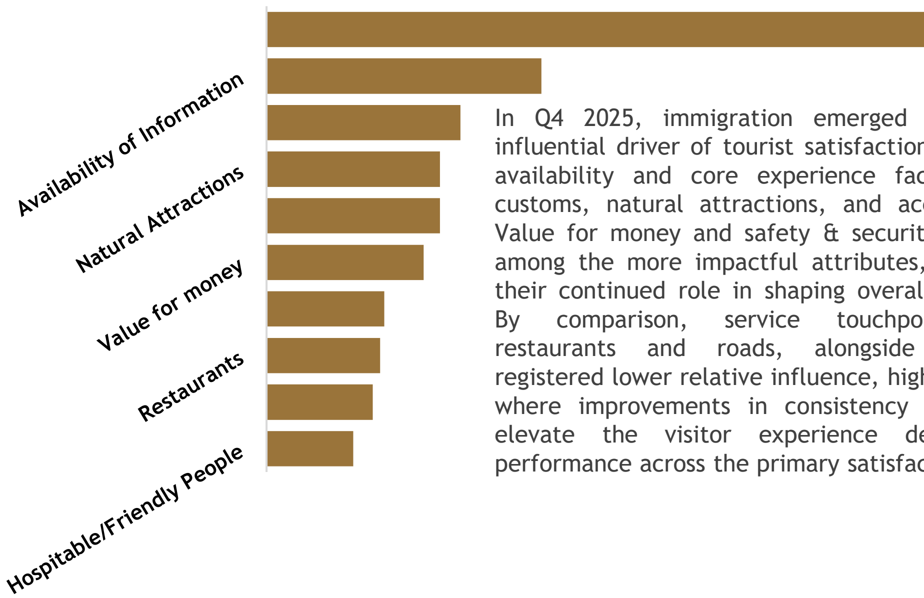
** Please can you rate the satisfaction or service level of your trip on the following attributes? Please rate the attributes where 1 = not at all satisfied, 5 = extremely satisfied.*

SATISFACTION RATING* 4.6 +1.2%

Model-based analysis of Q4 2025 Satisfaction results:

OVERALL SATISFACTION DRIVERS

Satisfaction Drivers Ranking Q4 2025

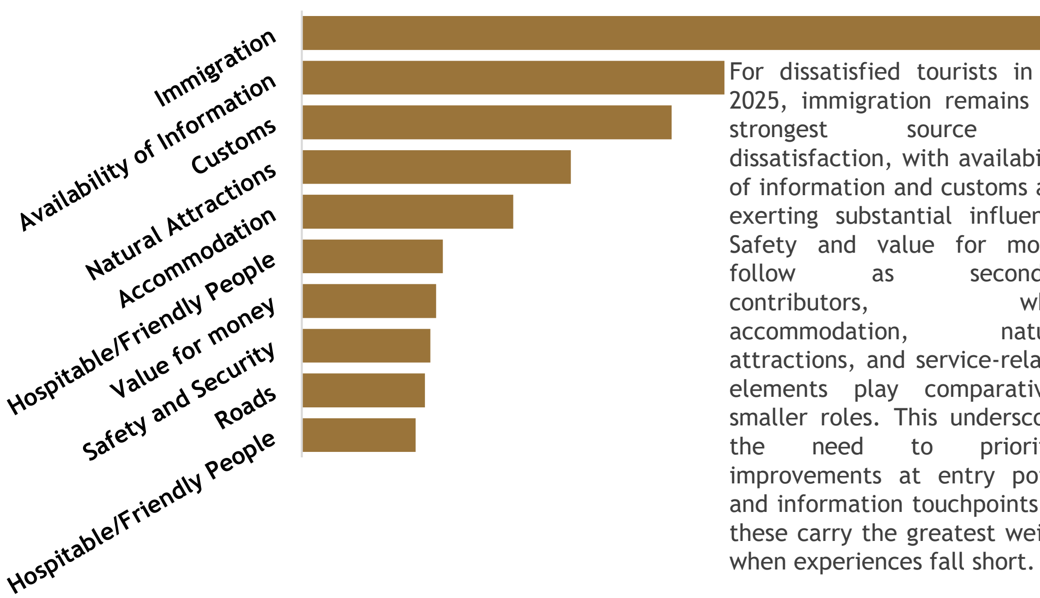


In Q4 2025, immigration emerged as the most influential driver of tourist satisfaction, followed by availability and core experience factors such as customs, natural attractions, and accommodation. Value for money and safety & security also ranked among the more impactful attributes, underscoring their continued role in shaping overall perceptions. By comparison, service touchpoints—including restaurants and roads, alongside hospitality—registered lower relative influence, highlighting areas where improvements in consistency could further elevate the visitor experience despite strong performance across the primary satisfaction drivers.

NB: The longer the bar, the better (the more is the importance).

WHAT MATTERS TO THE DISSATISFIED

Satisfaction Drivers Ranking for the Dissatisfied Q4 2025



For dissatisfied tourists in Q4 2025, immigration remains the strongest source of dissatisfaction, with availability of information and customs also exerting substantial influence. Safety and value for money follow as secondary contributors, while accommodation, natural attractions, and service-related elements play comparatively smaller roles. This underscores the need to prioritise improvements at entry points and information touchpoints, as these carry the greatest weight when experiences fall short.

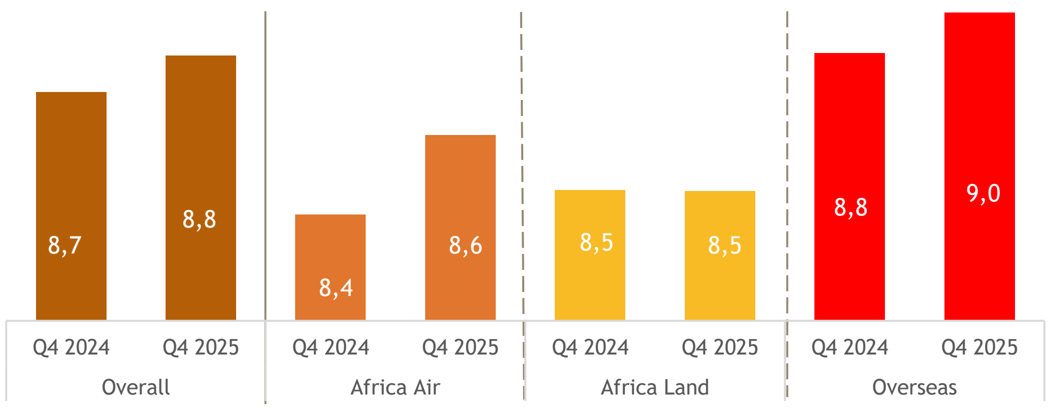
NB: The longer the bar, the better (the more is the importance).

EXPERIENCE RATING *

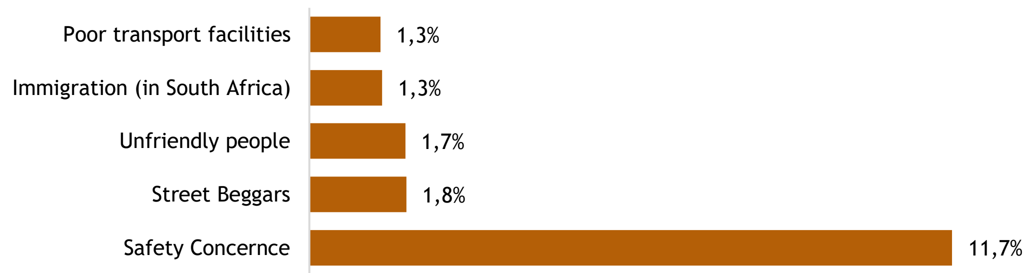
8.8% +0.1P.P*

In Q4 2025, overall experience ratings strengthened to 8.8, aligning closely with consistently high satisfaction levels. Overseas travellers recorded the highest scores at 9.0, supported by strong appreciation for scenery, hospitality, and value for money. Key detractors remained centred on safety concerns, alongside street begging and transport-related challenges. Positive highlights continued to be led by hospitality and friendly people, South Africa's scenery, and strong value perceptions.

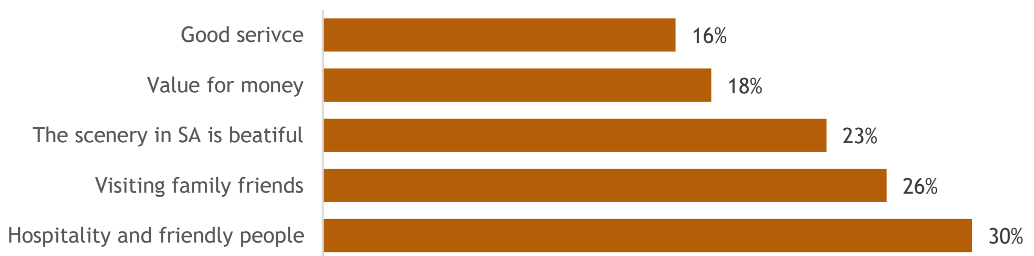
Experience Rating



Top 5 Worst Experiences in SA – Q4 2025



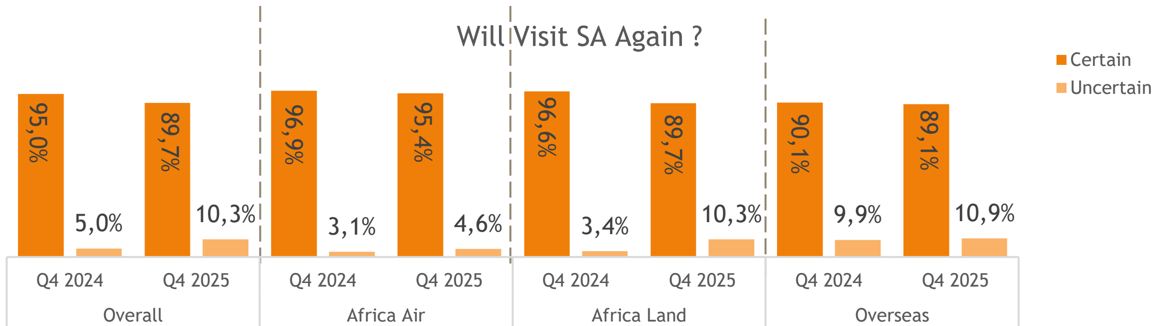
Top 5 Best Experiences in SA Q4 2025

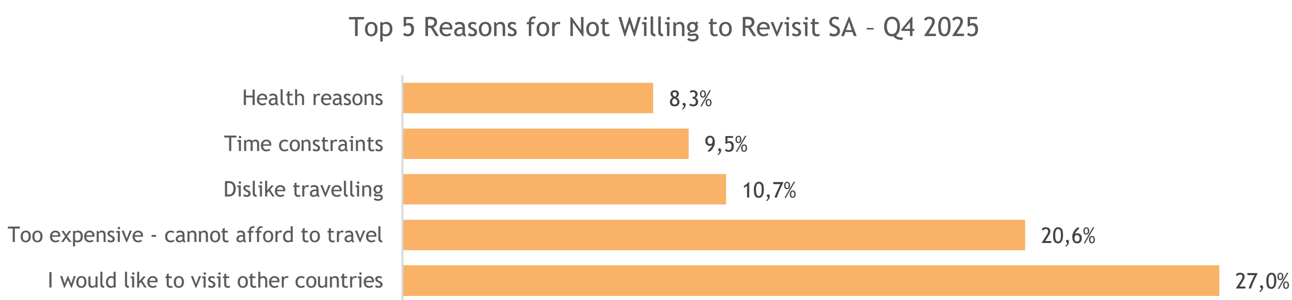


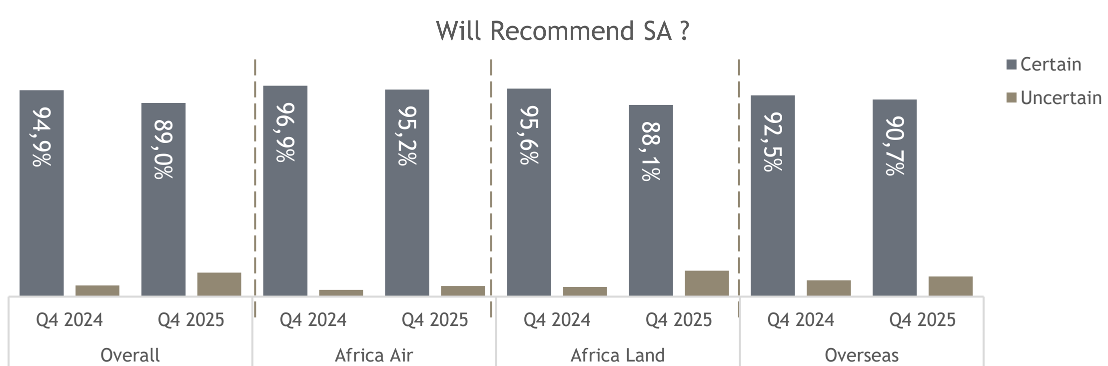
** On a scale of 1 to 10 where 1 is extremely bad and 10 is extremely good, please rate your overall experience in South Africa?*

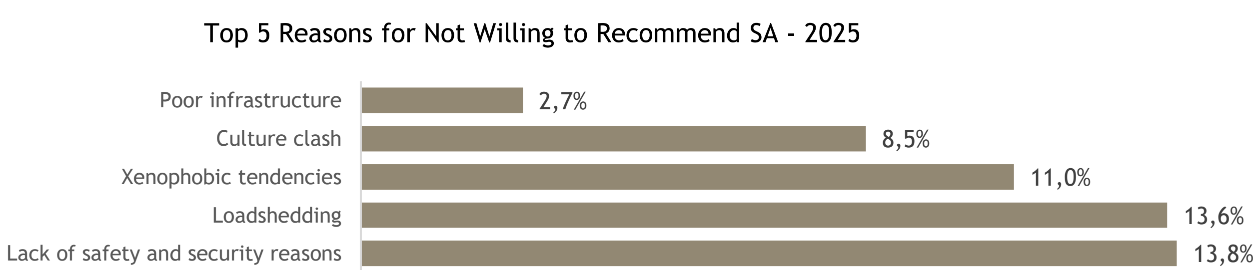
EXPERIENCE RATING 8.8% +0.1P.P*

Despite a slight softening, revisit intent remains high at 89.7%, while 89.0% of visitors indicate they would recommend South Africa, pointing to sustained advocacy with some emerging caution. Key concerns shaping hesitation centre on safety and security, alongside xenophobic perceptions and infrastructure-related challenges. To reinforce both satisfaction and advocacy, focus should be placed on strengthening safety visibility, improving mobility experiences, and sharpening messaging around warmth, inclusivity, and ease of travel.







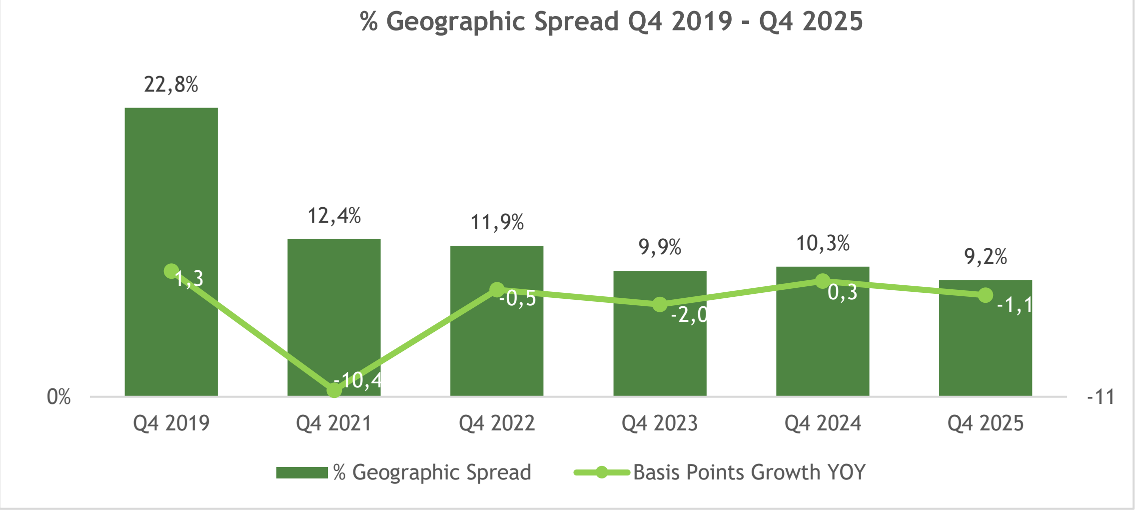


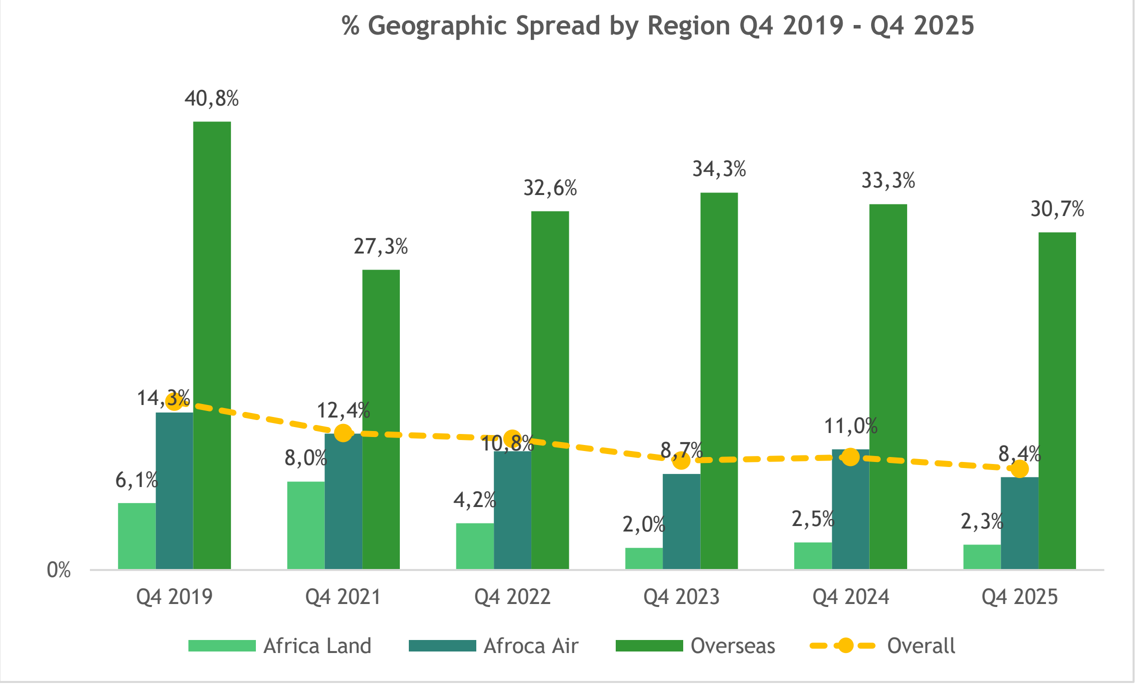
GEOGRAPHIC SPREAD

9.2%

-1.1P.P*

Following a gradual post-2019 contraction, the geographic spread index eased further to 9.2% in Q4 2025 from 10.3% in 2024, reflecting a -1.1 basis-point year-on-year decline. Africa Land remains the weakest contributor at 2.3%, continuing to trail its earlier levels and indicating limited dispersion among land-arriving travellers. Africa Air recorded 8.4%, maintaining a relatively stable position despite some softening compared to 2024. Overseas visitors continue to anchor geographic spread at 30.7%, though the decline from pre-pandemic levels highlights reduced breadth in travel patterns across destinations.





*Geographic spread is the share of tourists visiting 2 provinces or more.

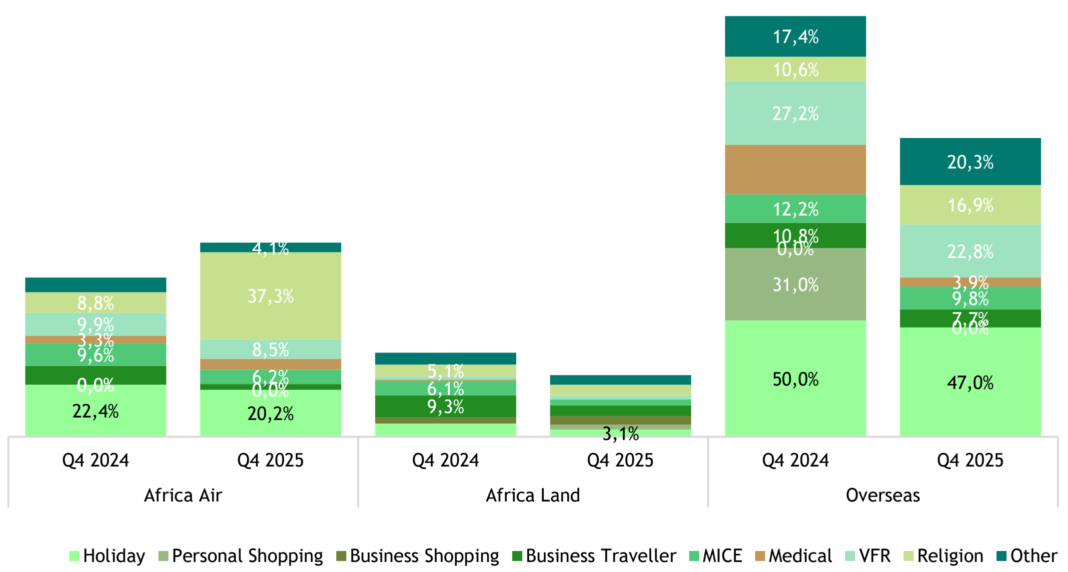
**Change in percentage points (P.P) vs. 2024.*

GEOGRAPHIC SPREAD

9.2% *+0.3P.P**

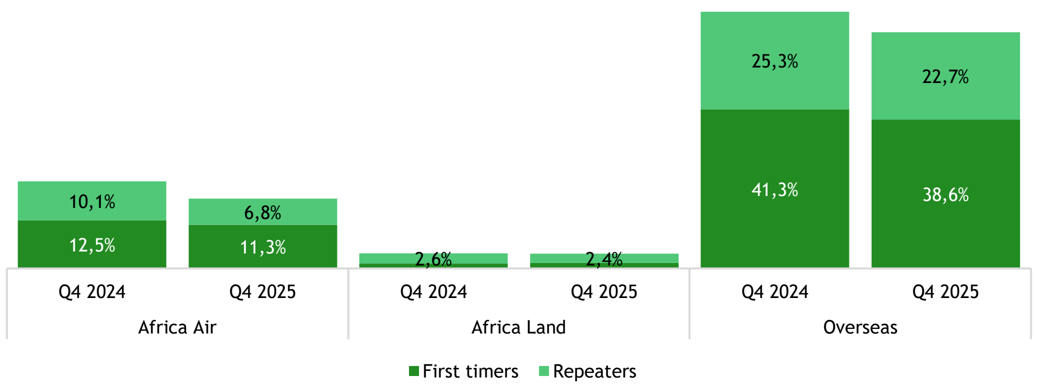
In Q4 2025, Africa Land continued to reflect constrained geographic spread across most travel purposes, with holiday at 3.1% and VFR at 1.8%, reinforcing its predominantly localised and family-centred travel patterns. Business (4.5%) and religious travel (4.6%) similarly contributed only limited dispersion. Africa Air showed a more diversified profile, led by holiday travel at 20.2%, while VFR (8.5%) and business travel (2.5%) added moderate reach. Overseas visitors remained the primary drivers of national dispersion, with holiday travel at 47.0% and VFR at 22.8% forming the broadest footprint, supported by religious (16.9%) and MICE-related travel (9.8%) that provided additional but smaller extensions.

Geospread by Purpose per Region Q4 2024 & Q4 2025



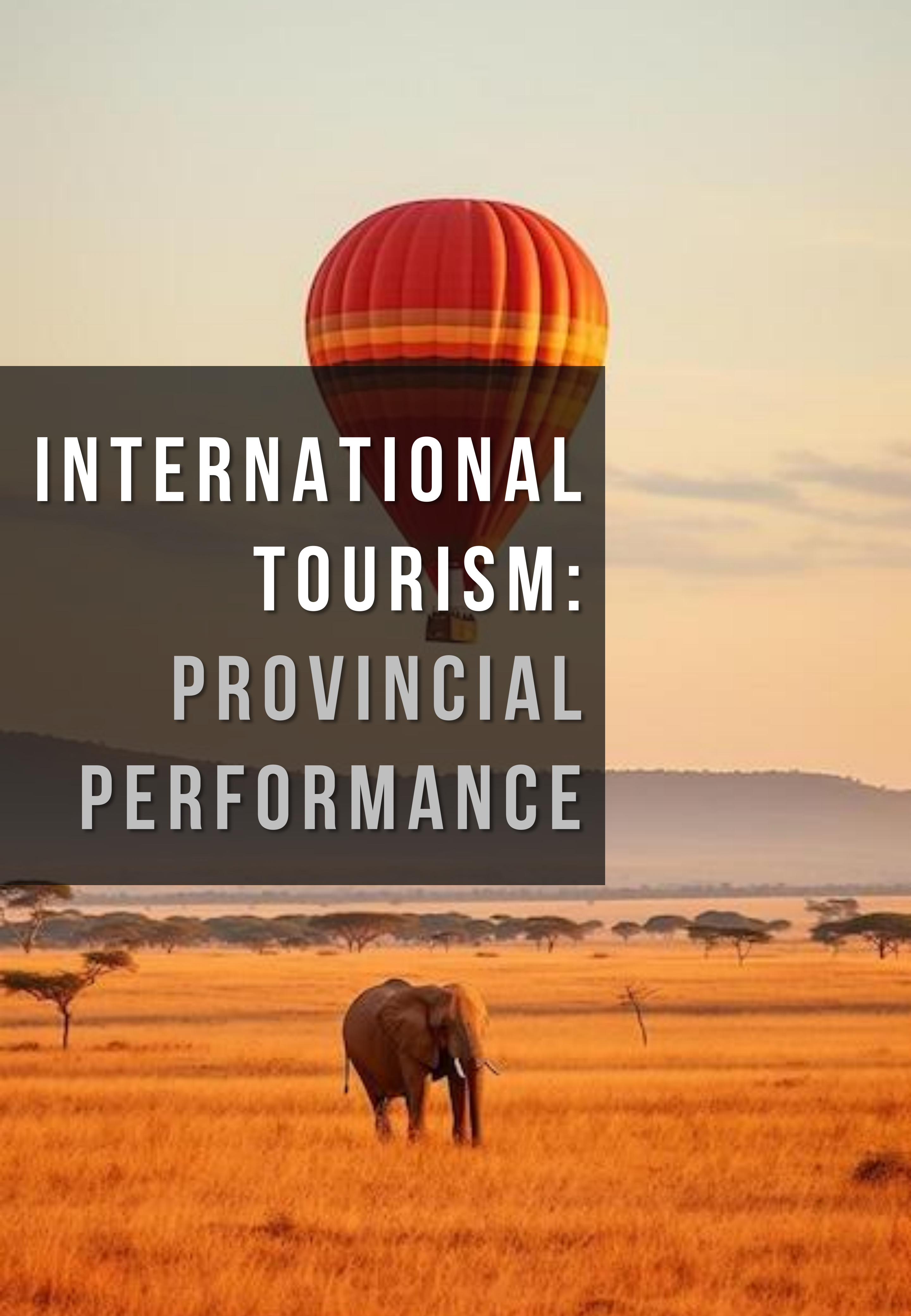
Across segments, first-time visitors continue to exhibit stronger geographic spread than repeat travellers, although both groups show some softening. For Africa Land, dispersion remains limited, with first-timers at 1.4% and repeat visitors at 2.4%, confirming restricted circulation across both segments. Africa Air maintains a more balanced profile, with first-time visitors at 11.3% and repeat travellers at 6.8%, supporting moderate levels of spread. Overseas markets continue to deliver the widest reach, with first-timers at 38.6% and repeat visitors at 22.7%, reinforcing their position as the primary drivers of multi-province travel.

Geospread by Number of Visits by Region Q4 2024 & Q4 2025



*Geographic spread is the share of tourists visiting 2 provinces or more.

INTERNATIONAL TOURISM: PROVINCIAL PERFORMANCE



PROVINCIAL ARRIVALS

2.9 MILLION +19.7%

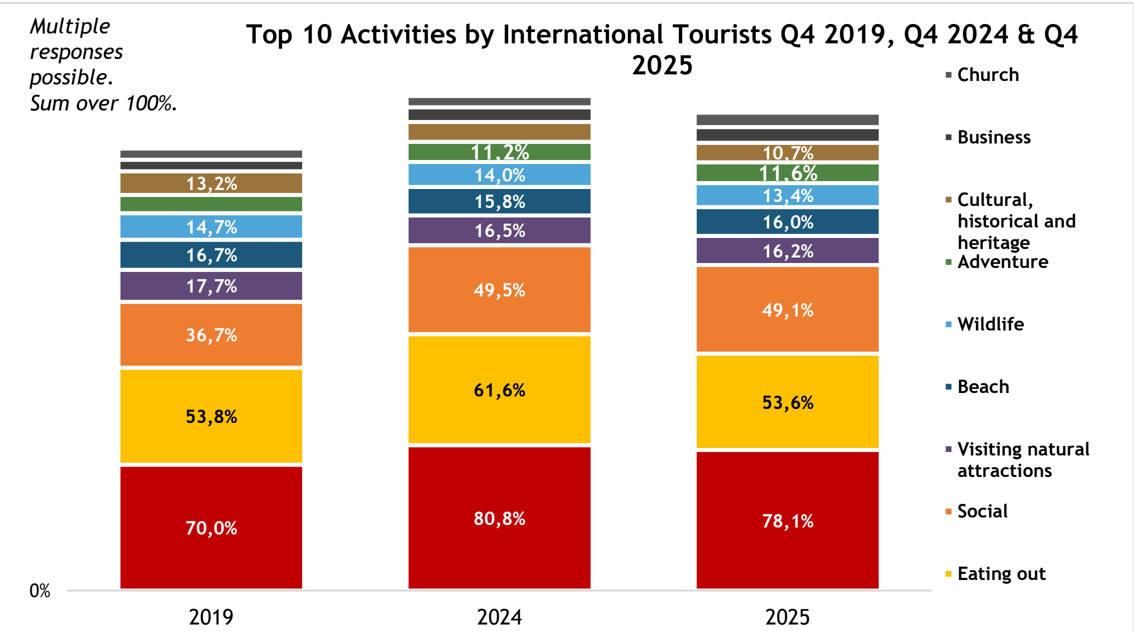
Gauteng continues to anchor international tourism flows, attracting 1.25 million visitors in Q4 2025 and generating the highest spend at ZAR 13.0 billion. Mpumalanga follows with 734.4 thousand arrivals, supported by its strong positioning within cross-border travel from neighbouring markets. The Western Cape ranks third at 466.8 thousand arrivals, while maintaining a strong value profile with ZAR 7.9 billion in spend, driven by long-haul visitors who typically deliver higher per-trip expenditure.

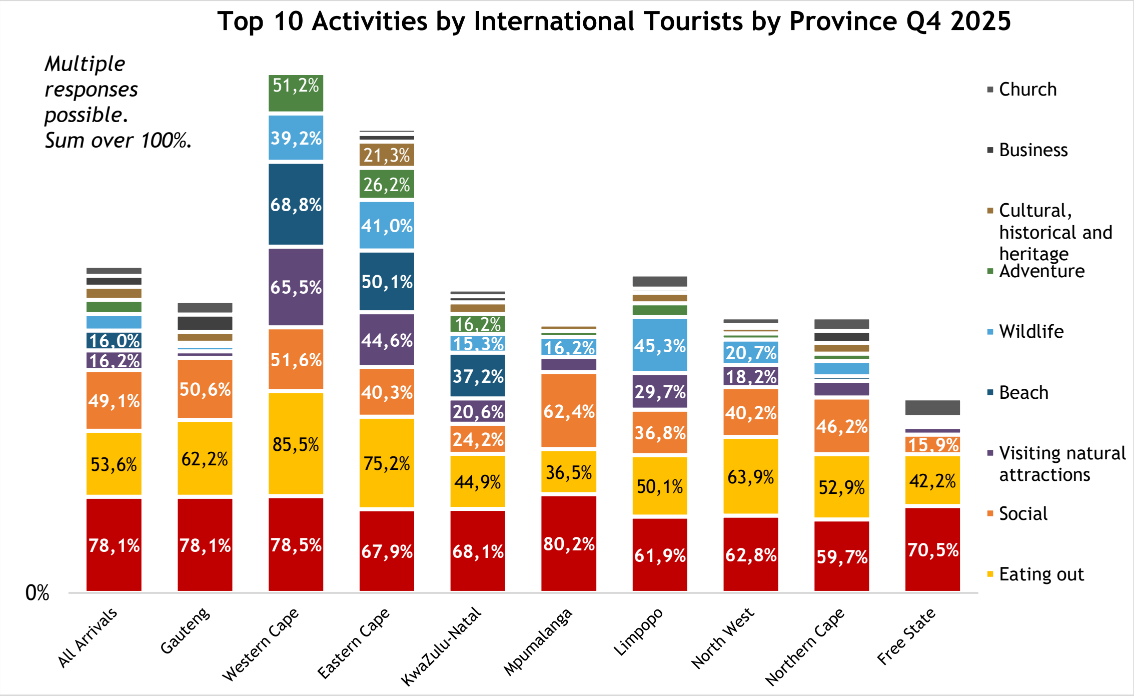
Tourist Arrivals, Spend, Bed Nights & Length of Stay by Province Q4 2025

Province	International Tourist Arrivals (000's) Q4 2025	Foreign Spend (ZAR Billions) Q4 2025	Bednights (Millions) Q4 2025	Length of Stay (nights) Q4 2025
Gauteng	1 246.7	13.0	19.7	16.3
Mpumalanga	734.4	2.4	8.8	12.4
Western Cape	466.8	7.9	5.6	12.3
KwaZulu-Natal	214.7	1.5	2.5	12.2
Free State	200.8	0.4	3.4	17.5
North West	120.2	0.6	1.5	13.1
Limpopo	116.4	1.5	1.3	11.9
Eastern Cape	106.6	1.1	1.6	15.9
Northern Cape	29.8	0.4	0.6	19.6

PROVINCIAL ARRIVALS **2.9 MILLION** **+19.7%**

Activity participation patterns in Q4 2025 remain anchored around core consumption behaviours, with shopping (78.1%), eating out (53.6%), and socialising (49.1%) continuing to dominate nationally. Provincial dynamics, however, reflect distinct tourism offerings. The Western Cape and Eastern Cape show strong coastal and nature-linked engagement, evident in elevated participation in beach, wildlife, adventure, and cultural activities. Gauteng retains a clearly urban profile, with high participation in shopping (78.1%), eating out (62.2%), and social activities (50.6%). Mpumalanga stands out with the highest shopping participation (80.2%) alongside moderate wildlife engagement (16.2%), reinforcing its strong appeal among cross-border travellers.

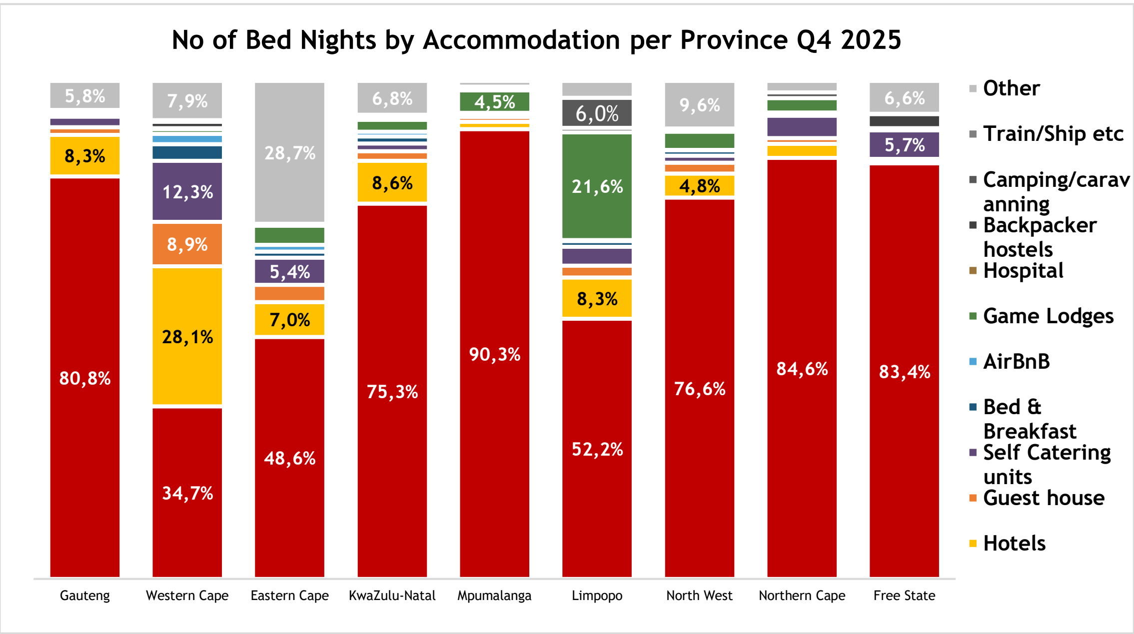


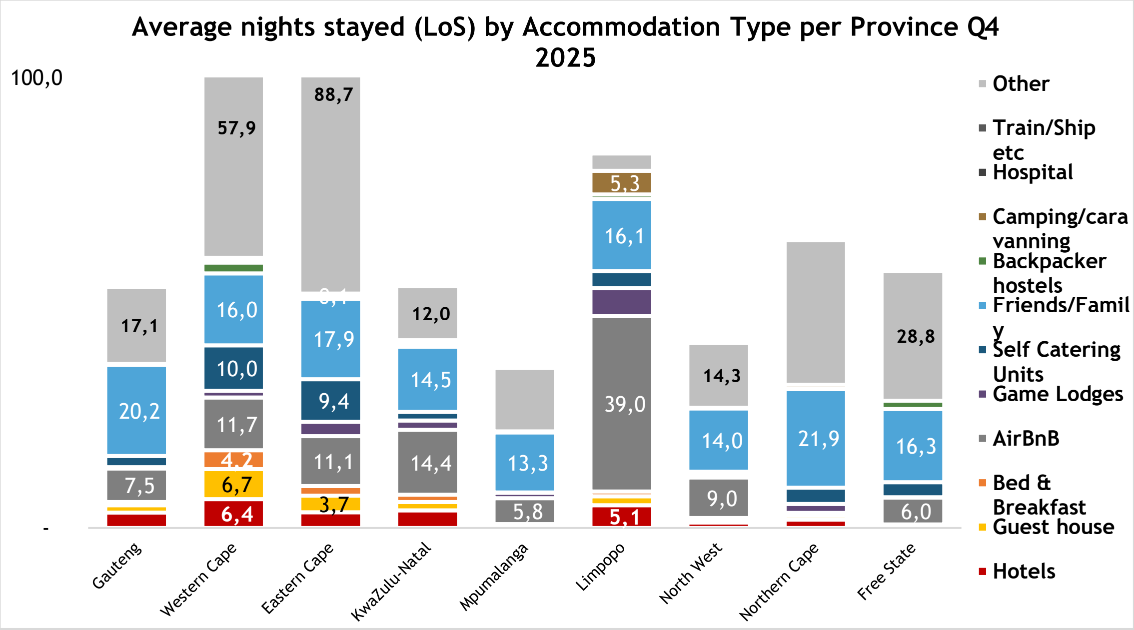


PROVINCIAL ARRIVALS

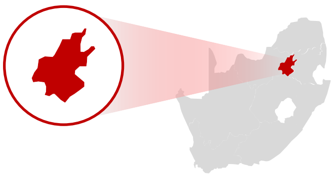
2.9 MILLION +19.7%

Accommodation patterns in Q4 2025 continue to highlight strong provincial contrasts, reflecting varied traveller profiles across destinations. Friends and family stays dominate in Mpumalanga (90.3%), the Free State (83.4%), and the Northern Cape (84.6%), with extended stays typically exceeding 13 nights in several provinces. Hotels show their strongest presence in the Western Cape (28.1%) and Gauteng (8.3%), with average stays of 6.4 and 3.4 nights respectively. Guest houses and self-catering units are more prominent in the Western Cape (8.9% and 12.3%), supporting longer stays of 6.7 and 10.0 nights. Game lodges remain a distinctive feature in Limpopo (21.6%), combined with longer stays averaging 6.2 nights, reinforcing its wildlife-driven positioning. By contrast, KwaZulu-Natal and Mpumalanga reflect shorter formal-accommodation stays, with hotel durations remaining below four nights.





GAUTENG 1 246.7 THOUSAND +23.9%



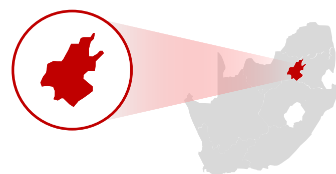
Gauteng continues to anchor South Africa's international arrivals, reaching 1.2 million in Q4 2025, a strong +23.9% increase on 2024 and +48.2% above 2019. Neighbouring markets remain dominant, led by Zimbabwe with 489 460 arrivals (39.3% share) and exceptional long-term growth of +383.3% since 2019. Lesotho (8.9%) and Mozambique (7.2%) follow, with Lesotho showing strong annual growth (+55.0%) while Mozambique continues to lag its 2019 position. Other regional markets such as Zambia (+29.5%) and Botswana, alongside Malawi, contribute steadily, while eSwatini shows slight softening year-on-year. Among overseas markets, the UK (3.9%), USA (3.4%), and Germany (3.0%) maintain a stable presence with moderate growth. Gauteng also remains the leading economic hub, generating ZAR 13.0 billion in foreign spend and 19.7 million bed nights, alongside sustained longer stays averaging 16.3 nights.

Gauteng International Tourist Arrivals by Top 10 Source Markets Q4 2025

Gauteng Top 10 Markets Q4 2025	Tourist Arrivals Q4 2025	% Share Q4 2025	% Growth Q4 2019 - Q4 2025	% Growth Q4 2024 - Q4 2025
Zimbabwe	489 460	39.3%	383.3%	41.0%
Lesotho	110 943	8.9%	18.8%	55.0%
Mozambique	90 013	7.2%	-41.2%	19.0%
eSwatini	53 647	4.3%	17.8%	-2.8%
Botswana	52 318	4.2%	-36.5%	-3.5%
UK	48 511	3.9%	10.7%	10.0%
Malawi	43 636	3.5%	8.6%	-11.4%
USA	42 689	3.4%	34.9%	-6.1%
Zambia	39 350	3.2%	24.3%	29.5%
Germany	36 987	3.0%	25.9%	21.6%
All Gauteng Arrivals	**1 246 657**	**43.5%**	**48.2%**	**23.9%**

GAUTENG

1 246.7 THOUSAND +23.9%



VFR travel continues to dominate Gauteng's visitor profile, accounting for 50.1% of arrivals in Q4 2025, up +4.3 percentage points from 2024 and +7.7 points above 2019. Holiday travel represents 14.2%, easing by -0.9 points year-on-year and remaining well below pre-pandemic levels (-5.3 points). Business-related segments remain broadly stable, with Business Travellers (7.8%) and MICE (8.6%) together contributing 16.4%, supported by moderate gains over both comparison periods. Other segments—including personal shopping (3.5%), medical (1.4%), and religious travel (1.7%)—continue to reflect smaller but steady shares. In accommodation, 80.8% of bed nights are spent with friends and family, marking a substantial +33.4 percentage point increase from 2024 and +52.7 points above 2019. Hotels (8.3%) and guest houses (1.5%) remain secondary, with other formal accommodation types contributing minimally. This reinforces VFR as the central driver of both travel purpose and accommodation patterns within Gauteng.

Share of Gauteng Tourist Arrivals by Main Purpose Q4 2025

Gauteng	VFR	Holiday	Business Traveller	Business Shopping	MICE	Personal Shopping	Medical	Religion
Q4 2025	50.1%	14.2%	7.8%	6.5%	8.6%	3.5%	1.4%	1.7%
Percentage Point Change 24-25	4.3	-0.9	-3.2	-1.3	1.6	0.3	0.0	0.7
Percentage Point Change 19-25	7.7	-5.3	1.4	-5.9	3.9	0.4	0.3	0.4

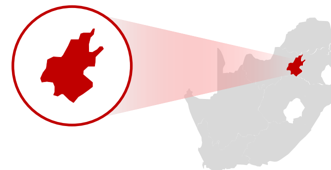
% of Bed Nights by Accommodation Type in Gauteng Q4 2025

Gauteng	Friends & Family	Hotels	Guest House	Self Catering	BnB	Air BnB	Game Lodge	Backpacker	Camping	Other
(% of bed nights) Q4 2025	80.8%	8.3%	1.5%	2.1%	0.6%	0.3%	0.2%	0.1%	0.1%	5.8%
Percentage Point Change 24-25	33.4	1.3	0.3	0.7	0.1	0.0	0.0	0.0	0.0	-3.3
Percentage Point Change 19-24	52.7	3.1	-0.3	-1.3	0.3	0.0	0.0	-2.5	-0.1	-1.5

	International Tourist Arrivals (Millions)	Total Direct Foreign Spend (ZAR Bn)	Ratio % Spend / % Arrivals
Total Arrivals	2.9	28.8	
Gauteng Total	1.2	13.0	
Share	43.5%	45.1%	103.5%

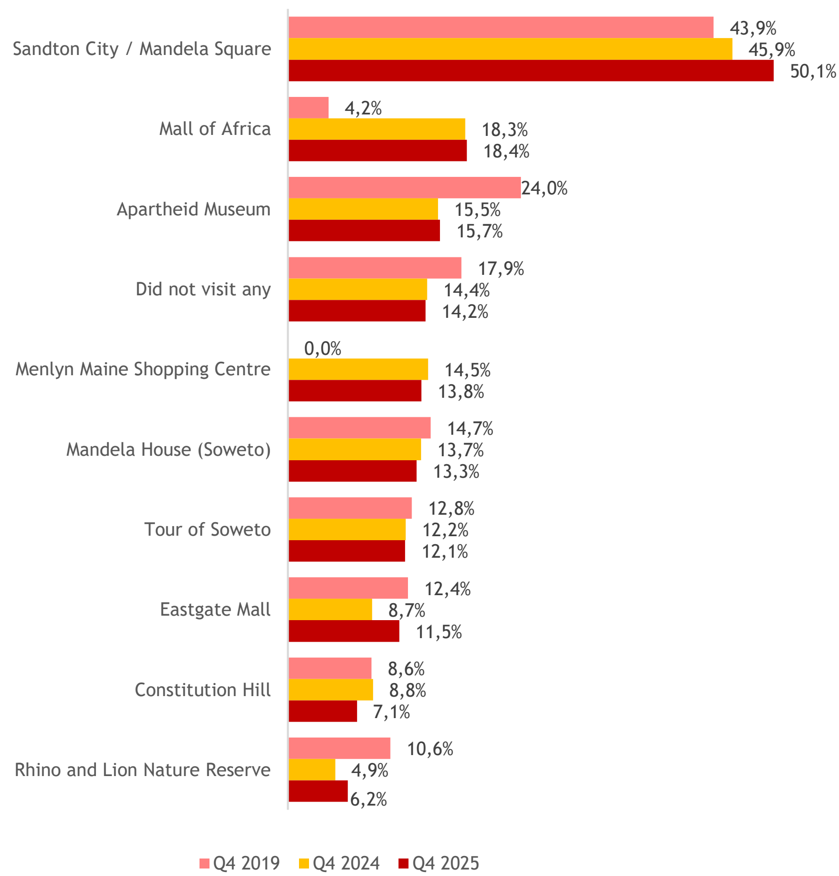
GAUTENG

1 246.7 THOUSAND +23.9%



Gauteng's position as a leading shopping and lifestyle destination continues to strengthen, with Sandton City / Mandela Square attracting 50.1% of international visitors in Q4 2025. The Mall of Africa follows at 18.4%, alongside strong interest in Menlyn Maine (13.8%), Eastgate Mall (11.5%), and the broader Johannesburg retail network. These trends align with activity patterns, where shopping (78.1%), eating out (62.2%), and social engagement (50.6%) remain dominant. Beyond retail, Gauteng's cultural and heritage assets retain strong appeal, with the Apartheid Museum (15.7%), Mandela House (13.3%), and the Tour of Soweto (12.1%) continuing to feature prominently in visitor itineraries. Together, these patterns highlight Gauteng's dual appeal as both a commercial hub and a gateway to culturally grounded urban experiences.

Gauteng International Tourist Top 10 Attractions Q4 2019 - Q4 2025



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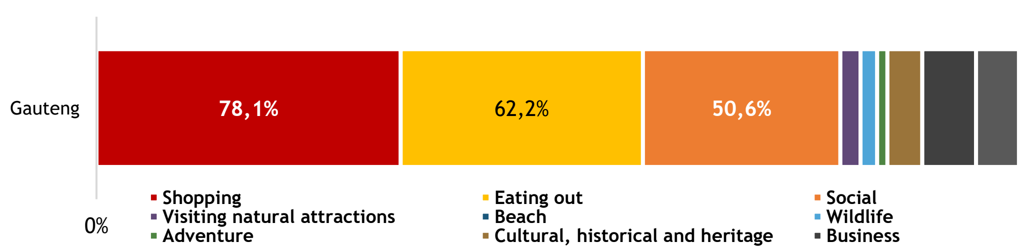
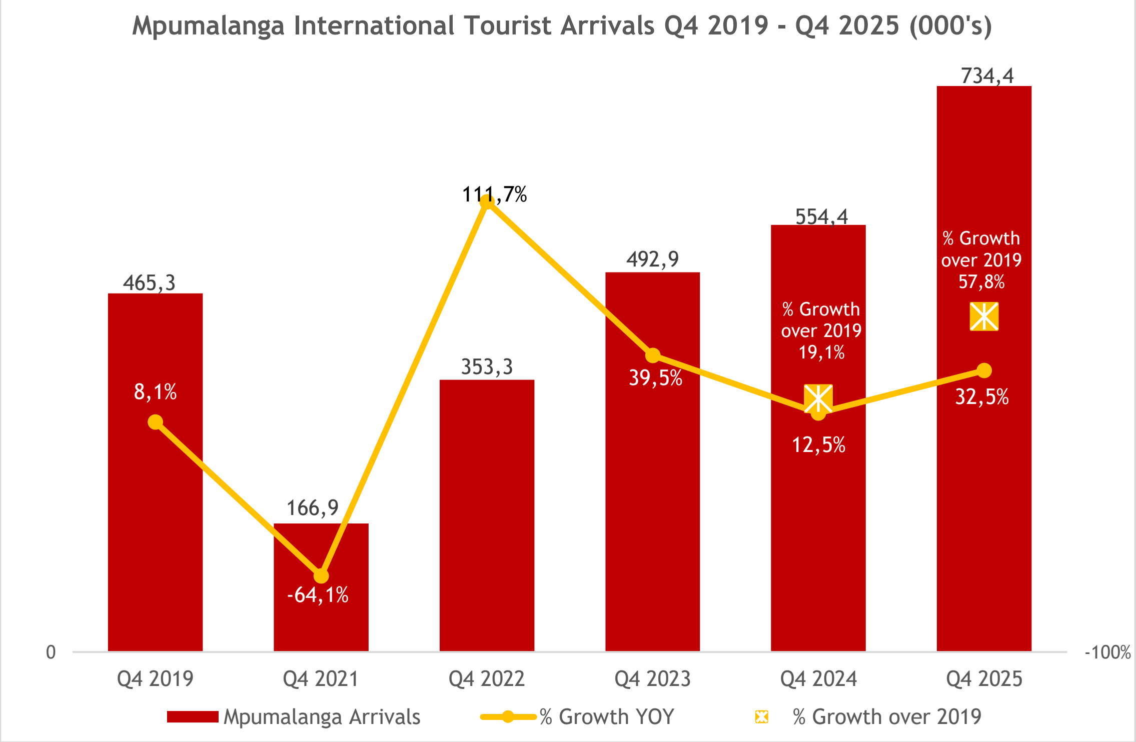
Top 10 Activities by International Tourists by Province Q4 2025



MPUMALANGA 734.4 THOUSAND +32.5%

Mpumalanga’s growth momentum remains firmly upward, with international arrivals reaching 734.4 thousand in Q4 2025, reflecting a strong +32.5% increase on 2024 and a notable +57.8% rise above 2019 levels. The province’s performance continues to be overwhelmingly driven by Mozambique, which accounts for 63.5% of arrivals, followed by eSwatini at 17.7%, together reinforcing the strength of cross-border travel flows. Long-haul markets add further depth to the mix, led by Germany (3.0%) and the USA (2.3%), although recovery across these markets remains uneven, with several European sources still below pre-pandemic benchmarks. Zimbabwe recorded solid long-term growth (+33.0%), while Brazil showed strong recent momentum (+50.7%), even as the UK and the Netherlands registered slight year-on-year declines. On the economic front, Mpumalanga generated ZAR 2.4 billion in foreign spend, supported by 8.8 million bed nights and an average stay of 12.4 nights, underscoring its continued appeal as a high-volume, cross-border-driven destination.

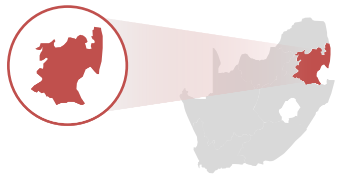


Mpumalanga International Tourist Arrivals by Top 10 Source Markets Q4 2025

Mpumalanga Top 10 Markets Q4 2025	Tourist Arrivals Q4 2025	% Share Q4 2025	% Growth Q4 2019 - Q4 2025	% Growth Q4 2024 - Q4 2025
Mozambique	466 516	63.5%	160.7%	44.4%
eSwatini	130 220	17.7%	6.7%	31.6%
Germany	21 723	3.0%	-12.1%	2.6%
USA	16 877	2.3%	-2.8%	6.0%
Zimbabwe	16 517	2.2%	33.0%	18.8%
France	10 882	1.5%	-28.2%	5.8%
UK	10 091	1.4%	-32.2%	-2.2%
The Netherlands	8 791	1.2%	-25.4%	-2.5%
Australia	5 781	0.8%	16.6%	-9.2%
Brazil	4 578	0.6%	15.5%	50.7%
All Mpumalanga Arrivals	734 376	25.6%	57.8%	32.5%

MPUMALANGA

734.4 THOUSAND +32.5%



A strong VFR-led structure defines Mpumalanga's travel profile in Q4 2025, with visits to friends and relatives accounting for 65.7% of all international arrivals. Holiday travel follows at 24.1%, reinforcing the province's dual positioning as both a social and nature-linked destination. Other segments, including business travel, shopping, and MICE, remain marginal, collectively contributing only a small share of total arrivals. Accommodation patterns closely mirror these trends, with friends and family accounting for 90.3% of all bed nights, underscoring the dominance of informal lodging. Game lodges contribute 4.5%, reflecting sustained interest in wildlife and nature-based experiences. By contrast, hotels, guest houses, and other formal accommodation options remain limited, highlighting Mpumalanga's continued reliance on VFR-driven and regionally anchored travel behaviour.

Share of Mpumalanga Tourist Arrivals by Main Purpose Q4 2025

Mpumalanga	VFR	Holiday	Business Traveller	Business Shopping	MICE	Personal Shopping	Medical	Religion
Q4 2025	65.7%	24.1%	0.9%	1.5%	0.8%	6.1%	1.0%	0.3%
Percentage Point Change 24-25	2.3	-0.9	0.2	0.3	-0.3	-1.2	-0.3	0.4
Percentage Point Change 19-25	3.4	-6.2	0.4	1.1	-0.1	3.7	0.5	-0.2

No of Bed Nights by Accommodation Type in Mpumalanga Q4 2025

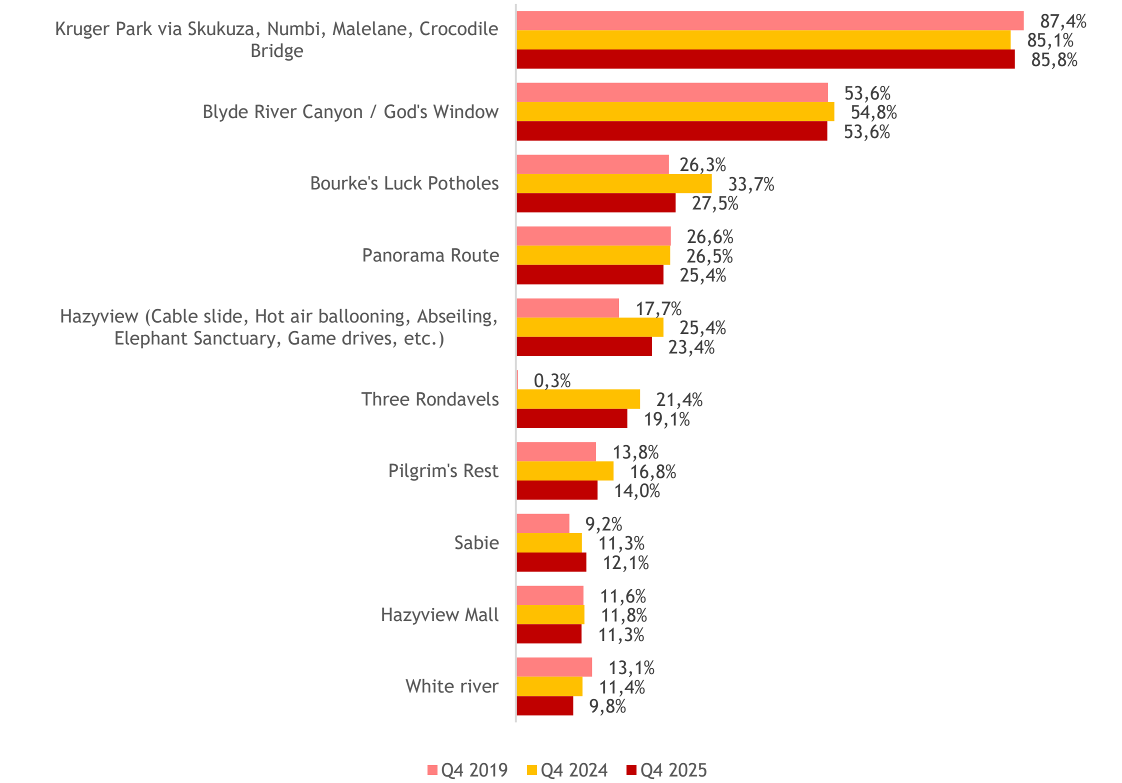
Mpumalanga	Friends & Family	Hotels	Guest House	Self Catering	BnB	Air BnB	Game Lodge	Backpacker	Camping	Other
(% of bed nights) Q4 2025	90.3%	1.4%	1.0%	0.3%	0.5%	0.1%	4.5%	0.2%	0.6%	1.1%
Percentage Point Change 24-25	32.0	-0.3	0.4	0.0	0.3	0.0	-0.2	-0.1	0.0	0.2
Percentage Point Change 19-24	51.1	0.1	-0.2	-0.8	0.1	-0.1	0.0	0.1	-0.4	-2.7

	International Tourist Arrivals (Millions)	Total Direct Foreign Spend (ZAR Bn)	Ratio % Spend / % Arrivals
Total Arrivals	2.9	28.8	
Mpumalanga Total	0.7	2.4	
Share	25.6%	8.2%	32.0%

MPUMALANGA 734.4 THOUSAND +32.5%

Anchored by its iconic nature-based assets, Mpumalanga's visitor footprint in Q4 2025 remains heavily concentrated around the Kruger National Park, which continues to dominate at 85.8% of international tourists. The Blyde River Canyon / God's Window holds its position as the second-most visited site at 53.6%, broadly stable year-on-year. Bourke's Luck Potholes (27.5%) and the Panorama Route (25.4%) remain key features of the tourism circuit, while Hazyview and its associated adventure offerings attract 23.4% of visitors. Secondary nodes such as Pilgrim's Rest (14.0%), Sabie (12.1%), and the Three Rondavels (19.1%) continue to register steady engagement. Activity patterns reinforce this mix, with shopping leading at 80.2%, followed by social activities (62.4%) and eating out (36.5%). Wildlife (16.2%) and visits to natural attractions (12.3%) remain central to the experience, sustaining Mpumalanga's positioning as a destination that blends retail, nature, and outdoor adventure.

Mpumalanga International Tourist Top 10 Attractions Q4 2019 - Q4 2025



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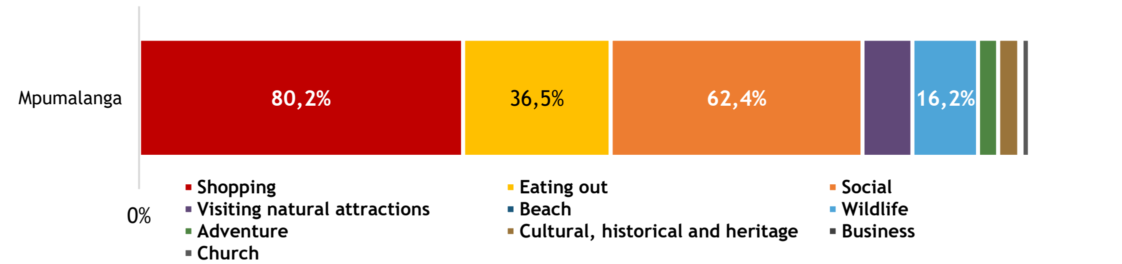
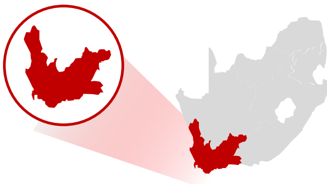
Top 10 Activities by International Tourists by Province Q4 2025

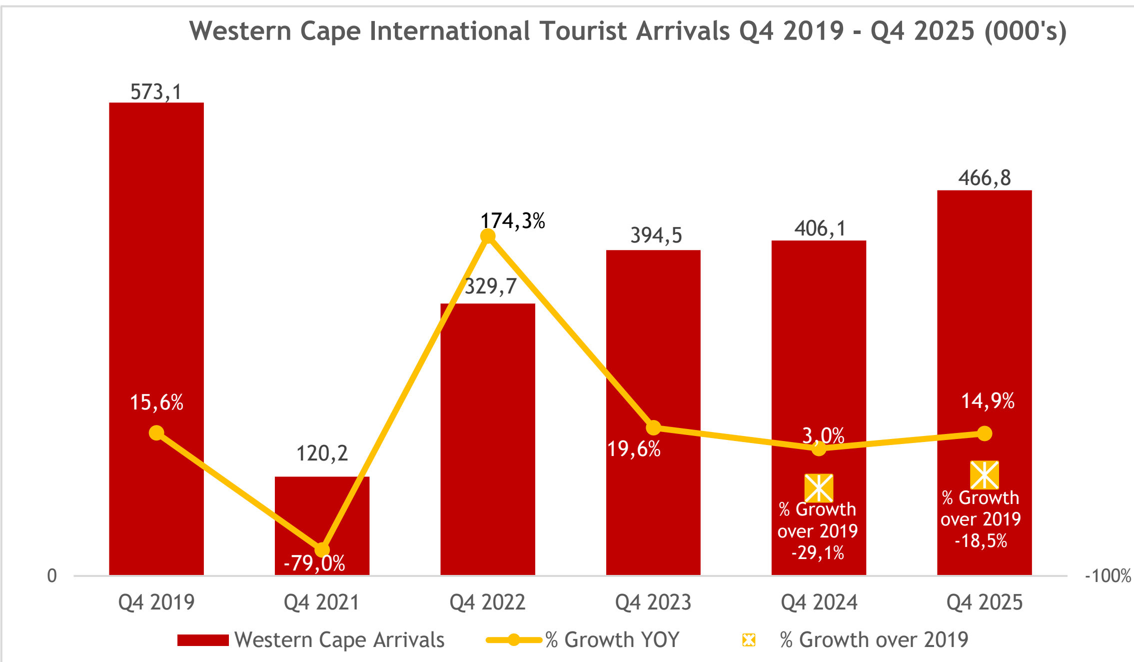


WESTERN CAPE

466.8 THOUSAND +14.9%



Long-haul demand continues to shape the Western Cape's arrival profile, with international arrivals reaching 466.8 thousand in Q4 2025, reflecting a +14.9% increase on 2024, though still -18.5% below 2019 levels. The province's top 10 markets account for a substantial share of arrivals, led by the UK (14.6%) and Germany (13.4%), alongside the USA (8.7%), reinforcing its reliance on traditional long-haul sources. Zimbabwe (6.6%) and Namibia (6.1%) remain the largest African contributors, adding regional depth to the market mix. Strong year-on-year gains are evident from Brazil (+59.9%), Zimbabwe (+40.9%), and Germany (+21.4%), helping offset continued softness across several European markets relative to 2019. This mix reflects a gradual rebalancing between long-haul recovery and strengthening regional inflows. At the same time, the slower return of key European markets continues to temper the pace of full recovery to pre-pandemic levels. Economically, the Western Cape continues to benefit from its high-value tourism profile, supported by visitors with longer stays and higher per-trip expenditure. The province generated ZAR 7.9 billion in foreign spend, alongside 5.6 million bed nights and an average stay of 12.3 nights, reinforcing its position as South Africa's leading leisure

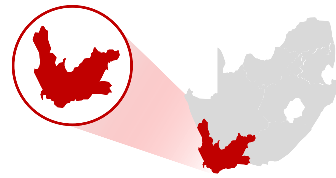


Western Cape International Tourist Arrivals by Top 10 Source Markets Q4 2025

Western Cape Top 10 Markets Q4 2025	Tourist Arrivals Q4 2025	% Share Q4 2025	% Growth Q4 2019 - Q4 2025	% Growth Q4 2024 - Q4 2025
UK	68 158	14.6%	-22.4%	18.6%
Germany	62 726	13.4%	-24.8%	21.4%
USA	40 652	8.7%	-27.5%	0.8%
Zimbabwe	30 835	6.6%	89.2%	40.9%
Namibia	28 462	6.1%	12.3%	6.6%
The Netherlands	23 609	5.1%	-10.1%	15.2%
France	21 622	4.6%	-37.4%	9.0%
Lesotho	16 180	3.5%	115.2%	-5.0%
Australia	15 938	3.4%	-8.4%	10.3%
Brazil	12 382	2.7%	8.1%	59.9%
All Western Cape Arrivals	466 835	16.3%	-18.5%	14.9%

WESTERN CAPE

466.8 THOUSAND +14.9%



A distinctly leisure-driven profile continues to define tourism in the Western Cape, with holiday travel accounting for 53.6% of international arrivals in Q4 2025, marking a +2.2 percentage point increase from 2024. Visiting friends and relatives (23.5%) remains the second-largest segment, supported by a marginal year-on-year uplift and a stronger gain relative to 2019. Accommodation patterns reflect this mix, with 34.7% of bed nights spent with friends and family, representing a +9.3 percentage point increase from 2024. At the same time, the province maintains a strong formal-accommodation base, with hotels (28.1%), guest houses (8.9%), self-catering units (12.3%), and BnBs/Airbnb (5.3%) together accounting for a significant share of total bed nights. This balance highlights the Western Cape's ability to combine a dominant leisure segment with a well-established and diversified accommodation offering.

Share of Western Cape Tourist Arrivals by Main Purpose Q4 2025

Western Cape	VFR	Holiday	Business Traveller	Business Shopping	MICE	Personal Shopping	Medical	Religion
Q4 2025	23.5%	53.6%	5.9%	0.2%	9.0%	0.3%	0.4%	0.5%
Percentage Point Change 24-25	0.3	2.2	0.1	0.0	-2.7	-0.1	-0.2	0.7
Percentage Point Change 19-25	9.0	-9.7	2.0	0.0	-1.1	0.2	-0.5	0.7

Share of Accommodation Types in Western Cape Q4 2025

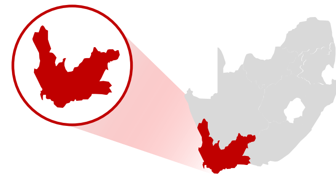
Western Cape	Friends & Family	Hotels	Guest House	Self Catering	BnB	Air BnB	Game Lodge	Backpacker	Camping	Other
(% of bed nights) Q4 2025	34.7%	28.1%	8.9%	12.3%	3.3%	2.0%	1.0%	1.3%	0.2%	7.9%
Percentage Point Change 24-25	9.3	5.5	0.4	-1.0	-0.1	-1.0	0.3	0.1	0.1	-5.1
Percentage Point Change 19-24	6.6	-13.3	-2.2	-2.7	-0.6	-8.7	0.1	-3.2	-0.6	-3.4

	International Tourist Arrivals (Millions)	Total Direct Foreign Spend (ZAR Bn)	Ratio % Spend / % Arrivals
Total Arrivals	2.9	28.8	
Western Cape Total	0.5	7.9	
Share	16.3%	27.5%	168.6%

Note: Lion's Head and Canal Walk were introduced as pre-codes to the questionnaire in Q2 2023

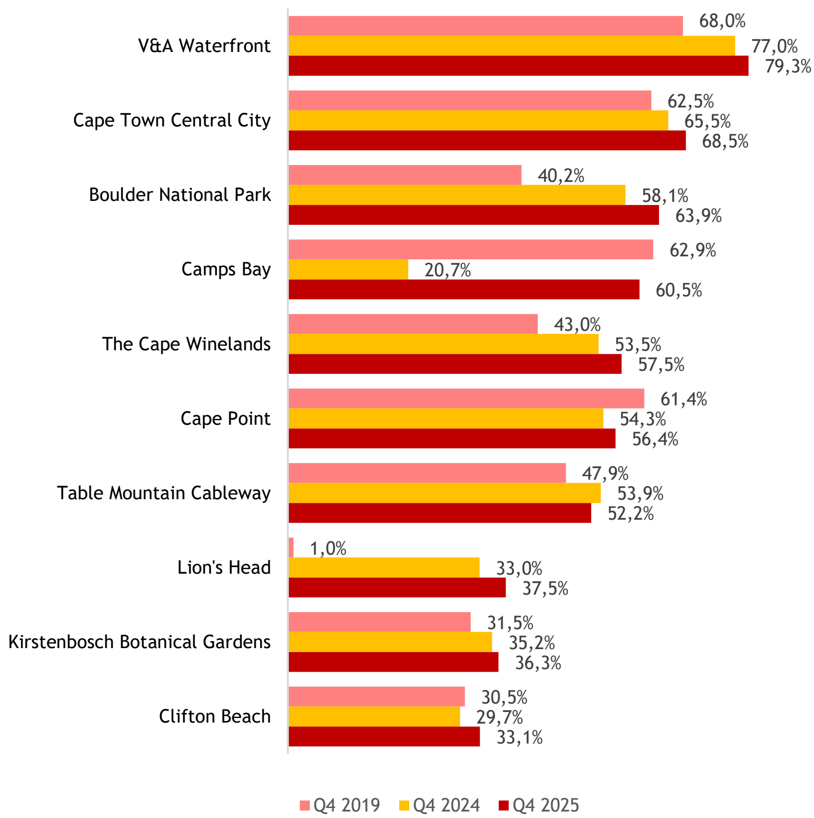
WESTERN CAPE

466.8 THOUSAND +14.9%



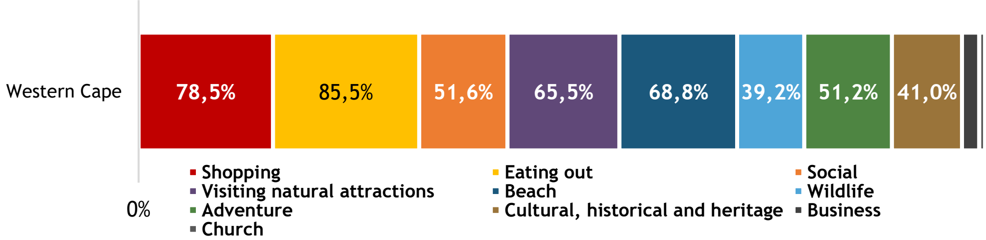
A diverse mix of urban, coastal, and nature-based attractions continues to underpin the Western Cape's strong international appeal in Q4 2025. The V&A Waterfront leads at 79.3%, followed by Cape Town Central City (68.5%), Boulders National Park (63.9%), Camps Bay (60.5%), and Cape Point (56.4%), reflecting broad engagement across the province's key nodes. This spread highlights the depth of the province's tourism offering across both city and natural environments. Activity patterns reinforce this balance, with eating out leading at 85.5%, followed by shopping (78.5%) and social activities (51.6%), while nature-led experiences—visiting natural attractions (65.5%), beaches (68.8%), and wildlife (39.2%)—remain strongly embedded in visitor behaviour. Together, these trends underscore the Western Cape's ability to combine vibrant urban experiences with its globally recognised scenic and coastal assets.

Western Cape International Tourist Top 10 Attractions Q4 2019 - Q4 2025



Multiple responses possible. Sum over 100%.

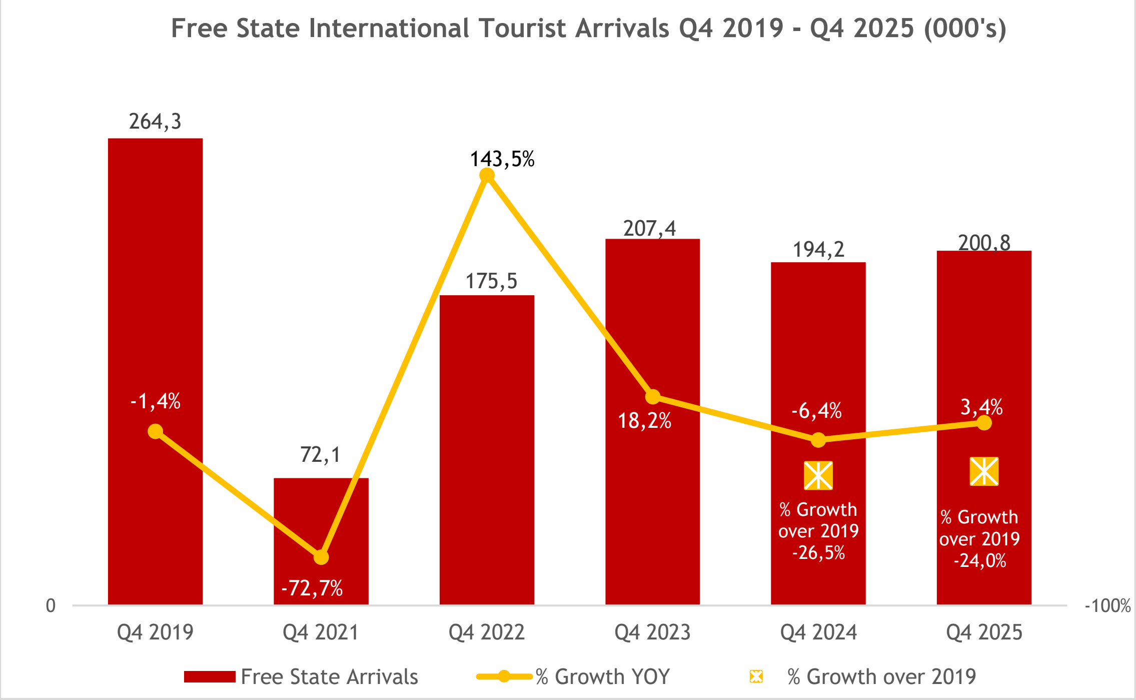
Top 10 Activities by International Tourists by Province Q4 2025



Note: Lion's Head and Canal Walk were introduced as pre-codes to the questionnaire in Q2 2023

FREE STATE 200.8 THOUSAND +3.4%

Cross-border dynamics continued to define the Free State's tourism performance in Q4 2025, with international arrivals reaching 200.8 thousand, reflecting a modest +3.4% year-on-year increase but still -24.0% below Q4 2019 levels. The province remains overwhelmingly dependent on Lesotho, which accounted for a dominant 90.7% of all arrivals (182.1 thousand), reinforcing its deep reliance on short-distance regional flows. While Lesotho recorded moderate annual growth (+7.5%), smaller markets such as the UK (+64.3%) and Australia (+27.2%) showed pockets of momentum, alongside strong long-term gains from Zimbabwe (+732.9%) and the USA (+65.1%). However, several regional markets weakened, including Botswana (-66.0%), Namibia (-40.6%), and the Netherlands (-4.0%), highlighting continued volatility in both regional and long-haul demand. Despite stable volumes, the Free State's economic contribution remains constrained, with limited foreign spend and relatively low engagement in high-value tourism segments. Average stays remain relatively long, supporting sustained bed night volumes and reaffirming the province's reliance on VFR-driven, lower-spend, extended-stay travel patterns.



Free State International Tourist Arrivals by Top 10 Source Markets Q4 2025

Free State Top 10 Markets Q4 2025	Tourist Arrivals Q4 2025	% Share Q4 2025	% Growth Q4 2019 - Q4 2025	% Growth Q4 2024 - Q4 2025
Lesotho	182 056	90.7%	-24.5%	7.5%
Zimbabwe	3 325	1.7%	732.9%	-31.7%
Botswana	3 111	1.5%	-47.2%	-66.0%
UK	2 220	1.1%	74.2%	64.3%
USA	1 410	0.7%	65.1%	-18.6%
eSwatini	1 251	0.6%	47.8%	#DIV/0!
Germany	977	0.5%	-67.0%	-1.9%
Namibia	819	0.4%	-34.7%	-40.6%
The Netherlands	699	0.3%	-47.5%	-4.0%
Australia	683	0.3%	23.4%	27.2%
All Free State Arrivals	200 788	7.0%	-24.0%	3.4%

FREE STATE

200.8 THOUSAND +3.4%

Deeply embedded social travel patterns continue to shape the Free State's tourism profile in Q4 2025, with visiting friends and relatives (VFR) accounting for a dominant 79.9% of all arrivals, up +3.3 percentage points year-on-year and +7.7 points above 2019 levels. Holiday travel remains marginal at 3.1%, while business-related segments—including business travel (2.7%), shopping (2.5%), and MICE (0.8%)—collectively contribute only a small share of total demand. This structure is closely mirrored in accommodation behaviour, where an overwhelming 83.4% of all bed nights are spent with friends and family, reflecting a substantial +31.9 percentage point increase from 2024 and a +23.9 point rise compared to 2019. Formal accommodation plays a very limited role, with hotels (0.4%), guest houses (0.5%), and self-catering units (5.7%) contributing marginally, alongside minimal uptake of other options such as BnBs and game lodges. Overall, these patterns reinforce the province's strong dependence on socially anchored, non-commercial travel, with limited penetration of higher-value, formal tourism infrastructure.

Share of Free State Tourist Arrivals by Main Purpose Q4 2025

Free State	VFR	Holiday	Business Traveller	Business Shopping	MICE	Personal Shopping	Medical	Religion
Q4 2025	79.9%	3.1%	2.7%	2.5%	0.8%	1.4%	0.9%	2.0%
Percentage Point Change 24-25	3.3	-0.7	-1.8	0.3	0.3	-0.3	0.1	-0.2
Percentage Point Change 19-25	7.7	-1.2	0.7	0.3	-0.5	-3.7	-0.1	1.1

Share of Accommodation Types in Free State Q4 2025

Free State	Friends & Family	Hotels	Guest House	Self Catering	BnB	Air BnB	Game Lodge	Backpacker	Camping	Other
(% of bed nights) Q4 2025	83.4%	0.4%	0.5%	5.7%	0.4%	0.0%	0.0%	2.9%	0.0%	6.6%
Percentage Point Change 24-25	31.9	0.0	-0.8	3.6	0.3	0.0	-0.1	-0.5	0.0	-7.9
Percentage Point Change 19-24	23.9	0.0	-0.2	3.7	0.0	0.0	-0.1	2.6	-0.1	-7.5

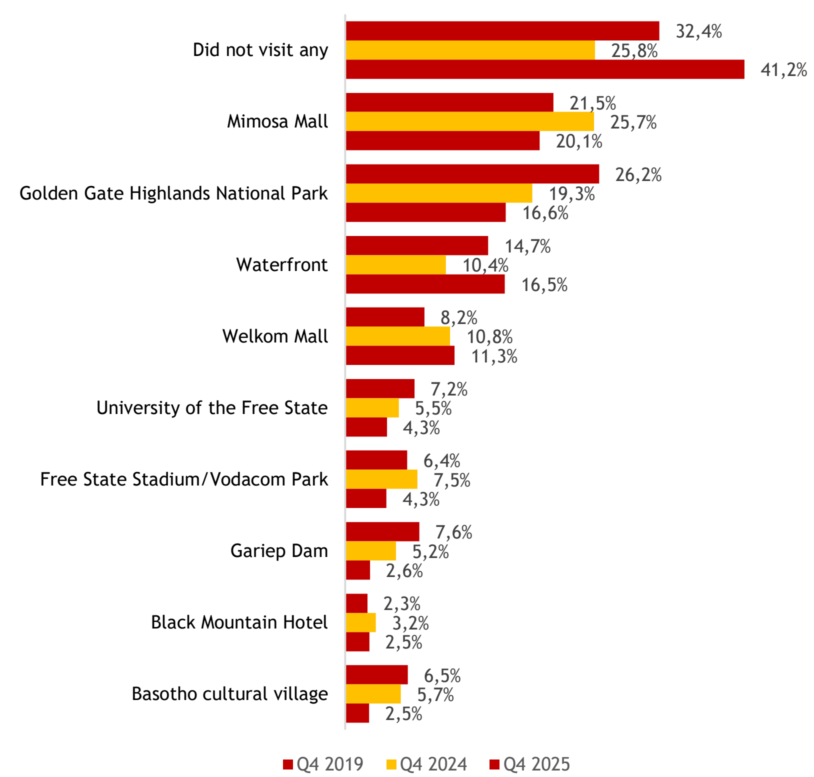
	International Tourist Arrivals (Millions)	Total Direct Foreign Spend (ZAR Bn)	Ratio % Spend / % Arrivals
Total Arrivals	2.9	28.8	
Free State Total	0.2	0.4	
Share	7.0%	1.6%	22.2%

FREE STATE

200.8 THOUSAND +3.4%

Patterns of visitor engagement in the Free State during Q4 2025 continue to reflect a strong blend of retail activity and socially driven travel, aligned with the province's dominant VFR profile. Shopping remains the leading activity at 70.5%, followed by eating out (42.2%) and social engagements (15.9%), underscoring the community-based and informal nature of most visits. A notably larger share of travellers (41.2%) did not visit any formal attraction, highlighting limited engagement with structured tourism offerings. Among those who did, retail nodes remained central, with Mimosa Mall (20.1%) and Welkom Mall (11.3%) maintaining prominence, alongside a resurgence in visits to the Waterfront (16.5%). Nature-based attractions such as Golden Gate Highlands National Park (16.6%) and Gariep Dam (2.6%), as well as cultural sites like the Basotho Cultural Village (2.5%), contributed modestly, reinforcing the province's secondary but still present leisure and heritage appeal.

Free State International Tourist Top 10 Attractions Q4 2019 - Q4 2025



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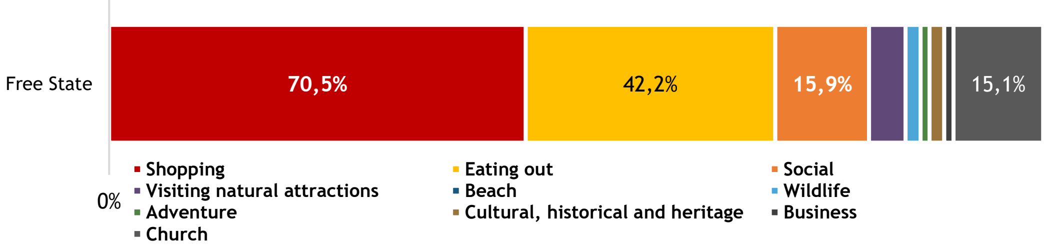
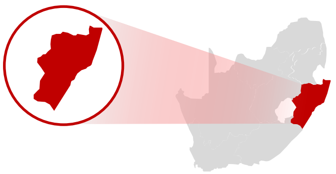
Top 10 Activities by International Tourists by Province Q4 2025



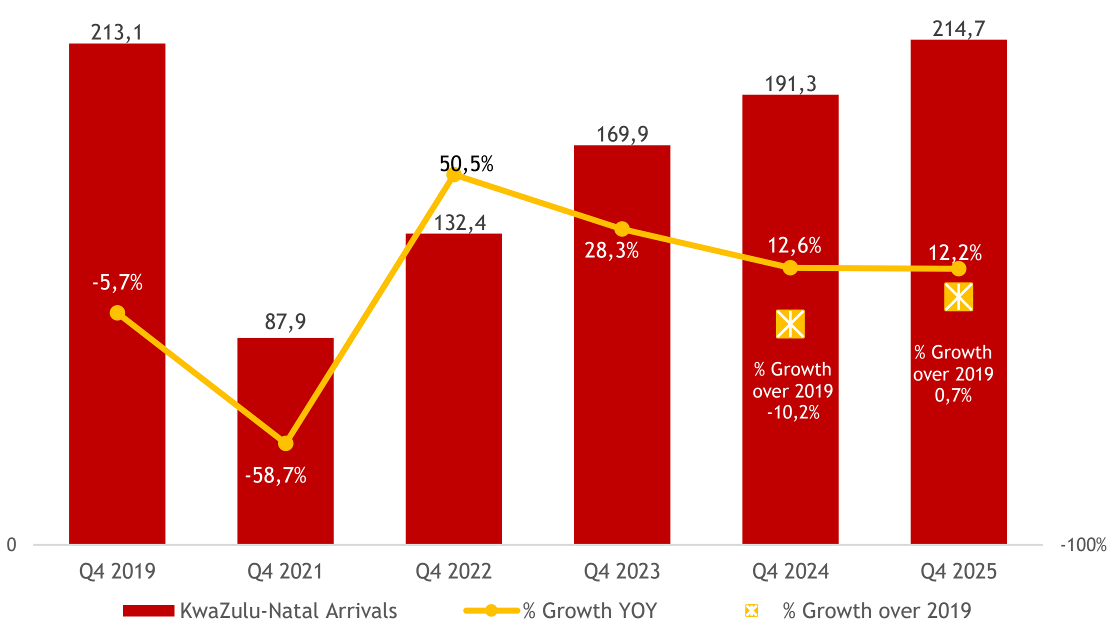
KWAZULU-NATAL

214.7 THOUSAND +12.2%



KwaZulu-Natal's international tourism trajectory continued to firm in Q4 2025, with arrivals reaching 214.7 thousand, reflecting a steady +12.2% year-on-year increase and a marginal +0.7% recovery above Q4 2019 levels. The province's performance remains anchored in regional demand, led by eSwatini (37.1%) and Zimbabwe (11.8%), which together account for nearly half of all arrivals. Zimbabwe continues to exhibit exceptional long-term growth (+348.5% vs. 2019) alongside solid annual gains, while Lesotho (9.4%) recorded particularly strong year-on-year expansion (+116.4%), signalling intensifying regional mobility. Among overseas markets, Germany (5.3%) showed notable annual growth (+39.7%), while the UK (4.6%) and USA (3.1%) recorded mixed short-term declines despite varied long-term trends. Additional momentum from Botswana (+108.7% YoY) and France (+1.9% YoY) points to gradual diversification, although volatility persists across several long-haul markets. Economically, KwaZulu-Natal's tourism base remains stable, with sustained regional flows and selective long-haul recovery supporting its position as a key coastal and cultural destination within South Africa's tourism landscape.

KwaZulu-Natal International Tourist Arrivals Q4 2019 - Q4 2025 (000's)

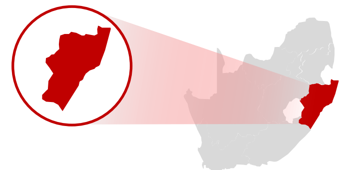


KwaZulu-Natal International Tourist Arrivals by Top 10 Source Markets Q4 2025

KwaZulu Natal Top 10 Markets Q4 2025	Tourist Arrivals Q4 2025	% Share Q4 2025	% Growth Q4 2019 - Q4 2025	% Growth Q4 2024 - Q4 2025
eSwatini	79 648	37.1%	-5.7%	5.7%
Zimbabwe	25 369	11.8%	348.5%	19.0%
Lesotho	20 145	9.4%	102.8%	116.4%
Germany	11 390	5.3%	-33.6%	39.7%
UK	9 911	4.6%	-18.9%	-3.1%
Zambia	7 706	3.6%	52.5%	-8.1%
USA	6 763	3.1%	0.1%	-26.4%
Botswana	5 557	2.6%	-66.6%	108.7%
France	5 269	2.5%	-30.7%	1.9%
The Netherlands	4 196	2.0%	-44.2%	-28.9%
All KwaZulu-Natal Arrivals	214 703	7.5%	0.7%	12.2%

KWAZULU-NATAL

214.7 THOUSAND +12.2%



Evolving travel patterns in KwaZulu-Natal during Q4 2025 continue to reflect a predominantly VFR-driven profile, with Visiting Friends and Relatives (VFR) remaining the leading purpose at 46.6%, despite a -4.8 percentage point decline from 2024, yet still +8.2 points above 2019 levels. Holiday travel increased to 24.2%, recording a modest +0.9 point year-on-year gain, although it remains significantly below its pre-pandemic position (-12.3 points vs. 2019). Business-related segments present a more nuanced picture, with Business Travellers (7.2%) and Business Shopping (7.6%) contributing similar shares, while MICE (1.9%) showed a notable year-on-year uplift (+1.7 points) despite softer long-term performance. Accommodation trends closely reflect these underlying dynamics. Friends and family dominate bed nights at 75.3%, rising sharply by +28.7 percentage points year-on-year and +36.2 points above 2019, reinforcing the province's strong reliance on informal lodging. Hotels (8.6%) and guest houses (1.9%) maintain secondary roles, while self-catering (1.5%), BnBs (1.4%), and game lodges (2.4%) provide additional but relatively limited capacity. Despite slight gains in formal accommodation, the overwhelming dominance of family-based stays continues to define KwaZulu-Natal's tourism structure, underscoring its dependence on socially driven travel demand.

Share of KwaZulu-Natal Tourist Arrivals by Main Purpose Q4 2025

KwaZulu-Natal	VFR	Holiday	Business Traveller	Business Shopping	MICE	Personal Shopping	Medical	Religion
Q4 2025	46.6%	24.2%	7.2%	7.6%	1.9%	0.2%	0.1%	1.3%
Percentage Point Change 24-25	-4.8	0.9	4.8	-2.9	1.7	3.2	0.0	-0.3
Percentage Point Change 19-25	8.2	-12.3	8.2	0.8	-0.3	0.6	-0.8	-0.2

Share of Accommodation Types in KwaZulu-Natal Q4 2025

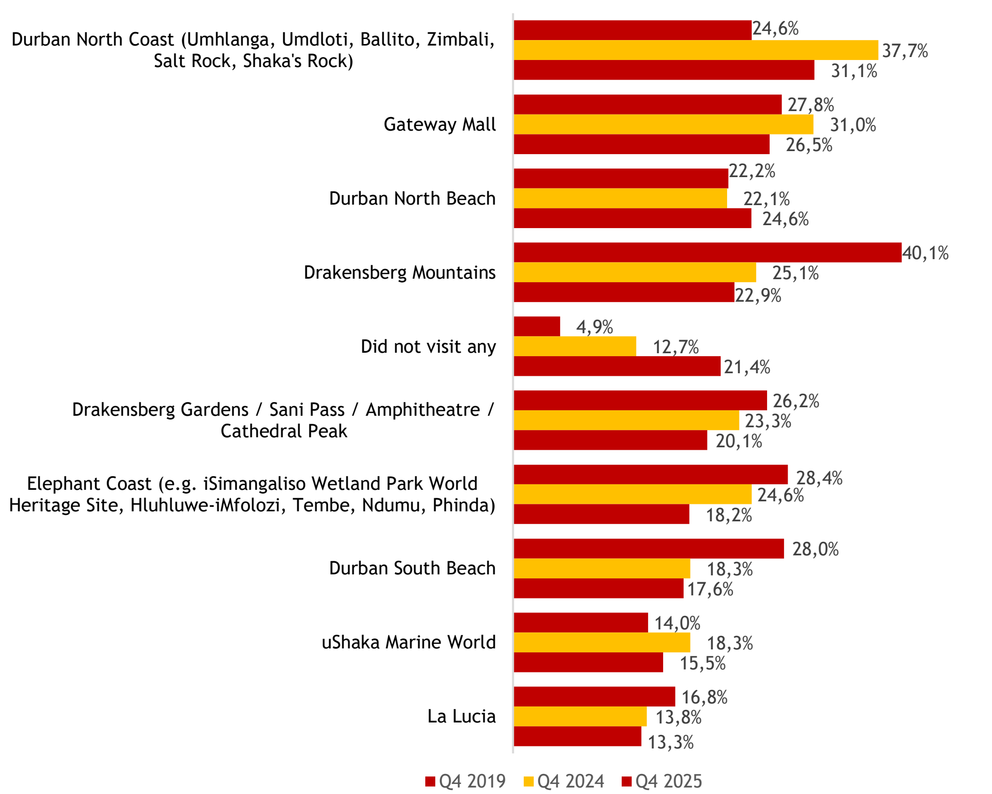
KwaZulu-Natal	Friends & Family	Hotels	Guest House	Self Catering	BnB	Air BnB	Game Lodge	Backpacker	Camping	Other
(% of bed nights) Q4 2025	75.3%	8.6%	1.9%	1.5%	1.4%	1.0%	2.4%	0.5%	0.4%	6.8%
Percentage Point Change 24-25	28.7	1.6	-1.0	-2.2	-0.2	-0.5	0.6	-1.6	0.1	-0.5
Percentage Point Change 19-24	36.2	0.8	-2.9	-1.6	-0.9	-0.6	-0.2	-1.3	-1.5	-1.7

	International Tourist Arrivals (Millions)	Total Direct Foreign Spend (ZAR Bn)	Ratio % Spend / % Arrivals
Total Arrivals	2.9	28.8	
KwaZulu-Natal Total	0.2	1.5	
Share	7.5%	5.3%	70.1%

KWAZULU-NATAL **214.7 THOUSAND** **+12.2%**

Tourism engagement patterns in KwaZulu-Natal during Q4 2025 continue to reflect a strong interplay between coastal leisure and retail activity, with both beach destinations and shopping nodes sustaining broad appeal. The Durban North Coast (31.1%) and Gateway Mall (26.5%) remain leading attractions, reinforcing the province's combined seaside and commercial draw. Durban North Beach (24.6%) continues to feature prominently, while the Drakensberg Mountains (22.9%) and the Elephant Coast (18.2%) maintain relevance despite some softening, alongside a notable rise in visitors not engaging with formal attractions (21.4%). Activity patterns remain aligned with these behaviours: shopping (68.1%) and eating out (44.9%) dominate participation, supported by beach visits (37.2%), social activities (24.2%), and engagement with natural attractions and wildlife. These trends highlight KwaZulu-Natal's continued positioning as a coastal destination with strong urban-retail support, though with increasing signs of selective engagement across its broader tourism offering.

KwaZulu-Natal International Tourist Top 10 Attractions Q4 2019 - Q4 2025



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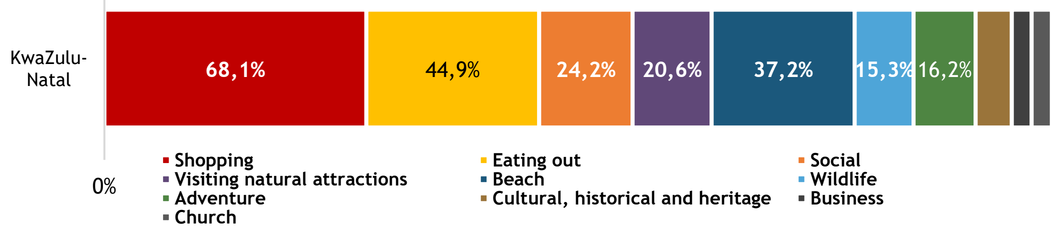
Top 10 Activities by International Tourists by Province Q4 2025

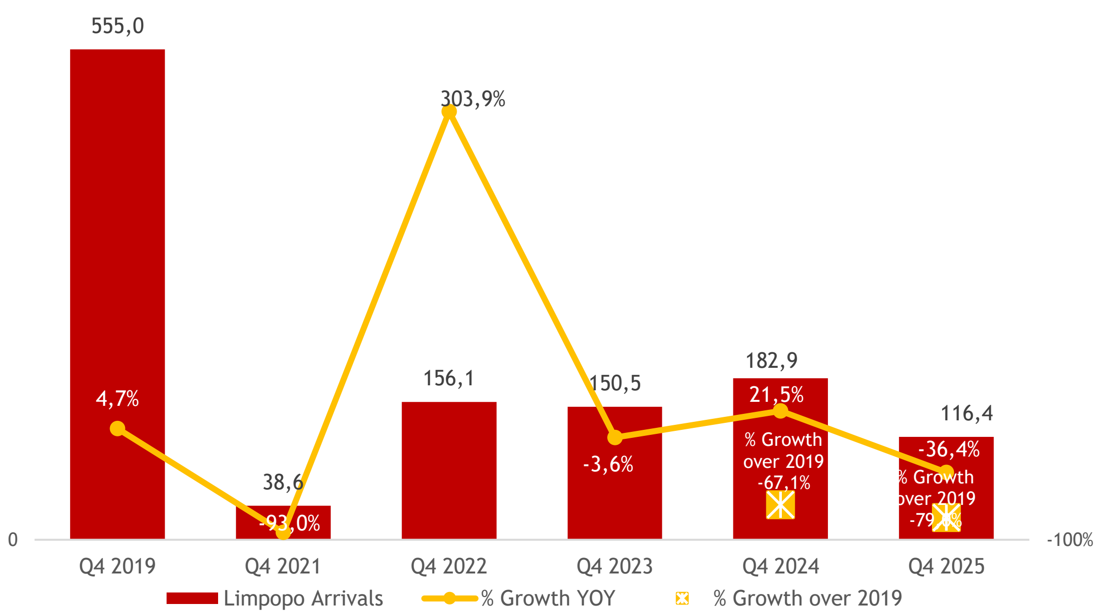


LIMPOPO

116.4 THOUSAND -36.4%

Following a period of partial recovery in 2024, Limpopo's international tourism performance in Q4 2025 weakened again, with arrivals reaching 116.4 thousand, reflecting a sharp -36.4% year-on-year decline and still -79.0% below Q4 2019 volumes. The province continues to depend heavily on regional markets, led by Zimbabwe (24.5%) and Botswana (20.5%), although both remain substantially below pre-pandemic levels (-93.8% and -50.5% vs. 2019, respectively). In contrast, several long-haul markets are showing stronger recovery dynamics, with the USA (+53.8% YoY; +73.8% vs. 2019), the Netherlands (+34.8% YoY), and Australia (+57.0% YoY) recording notable gains, alongside exceptional growth from Switzerland (+134.9% YoY; +1509.9% vs. 2019) and eSwatini (+133.6% YoY; +582.9% vs. 2019). Additional support from Germany (+7.4% YoY) and France (+22.0% YoY) further contributes to gradual diversification of the visitor mix. Despite subdued volumes, Limpopo continues to sustain economic activity through nature-based tourism and cross-border travel flows, although overall foreign spend remains modest. Bed night generation continues to be supported by longer stays across smaller and niche market segments, reinforcing the province's reliance on extended-duration travel rather than high visitor volumes.

Limpopo International Tourist Arrivals Q4 2019 - Q4 2025 (000's)



Limpopo International Tourist Arrivals by Top 10 Source Markets Q4 2025

Limpopo Top 10 Markets Q4 2025	Tourist Arrivals Q4 2025	% Share Q4 2025	% Growth Q4 2019 - Q4 2025	% Growth Q4 2024 - Q4 2025
Zimbabwe	28 461	24.5%	-93.8%	-73.7%
Botswana	23 802	20.5%	-50.5%	4.1%
USA	12 162	10.5%	73.8%	53.8%
Germany	8 538	7.3%	21.8%	7.4%
UK	6 910	5.9%	16.5%	25.5%
The Netherlands	5 006	4.3%	22.4%	34.8%
eSwatini	3 971	3.4%	582.9%	133.6%
France	3 134	2.7%	127.3%	22.0%
Australia	2 421	2.1%	70.7%	57.0%
Switzerland	1 821	1.6%	1509.9%	134.9%
All Limpopo Arrivals	116 358	4.1%	-79.0%	-36.4%

LIMPOPO

116.4 THOUSAND -36.4%

Limpopo's travel motivation profile in Q4 2025 reflects a markedly uneven and evolving structure, with personal shopping (34.2%) and Visiting Friends and Relatives (VFR) (32.5%) jointly emerging as the dominant segments. VFR recorded a notable +6.2 percentage point increase year-on-year and a strong +18.3 point rise relative to 2019, while holiday travel (18.3%) expanded significantly (+21.5pp YoY; +33.1pp vs. 2019), indicating a strengthening leisure component. In contrast, Business Shopping declined sharply to 11.9% (-6.6pp YoY; -16.2pp vs. 2019), while Business Travellers (3.4%) and MICE (0.8%) remained marginal. Accommodation patterns reinforce a dual structure combining social and nature-based travel. Stays with friends and family dominate at 52.2% of bed nights, rising by +9.1pp year-on-year, while game lodges account for a substantial 21.6% (+3.8pp YoY), underscoring the continued strength of wildlife tourism. Hotels (8.3%), guest houses (2.4%), and self-catering (3.8%) contribute moderate shares, alongside niche segments such as camping (6.0%), backpackers (0.9%), and BnBs (1.2%). Overall, Limpopo exhibits a hybrid tourism profile, combining strong cross-border retail activity with wildlife-driven leisure demand and socially anchored travel patterns.

Share of Limpopo Tourist Arrivals by Main Purpose Q4 2025

Limpopo	VFR	Holiday	Business Traveller	Business Shopping	MICE	Personal Shopping	Medical	Religion
Q4 2025	32.5%	18.3%	3.4%	11.9%	0.8%	34.2%	0.2%	1.8%
Percentage Point Change 24-25	6.2	21.5	0.0	-6.6	0.0	-26.8	0.7	1.7
Percentage Point Change 19-25	18.3	33.1	3.1	-16.2	-1.0	-43.7	0.8	1.4

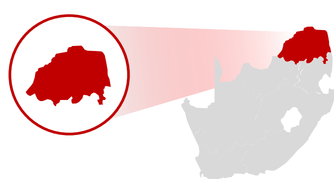
Share of Accommodation Types in Limpopo Q4 2025

Limpopo	Friends & Family	Hotels	Guest House	Self Catering	BnB	Air BnB	Game Lodge	Backpacker	Camping	Other
(% of bed nights) Q4 2025	52.2%	8.3%	2.4%	3.8%	1.2%	0.2%	21.6%	0.9%	6.0%	3.4%
Percentage Point Change 24-25	9.1	5.5	0.4	1.7	-0.3	0.2	3.8	-1.4	3.7	-8.0
Percentage Point Change 19-24	-19.1	6.6	-3.3	2.3	0.9	0.1	3.4	0.6	1.0	-19.6

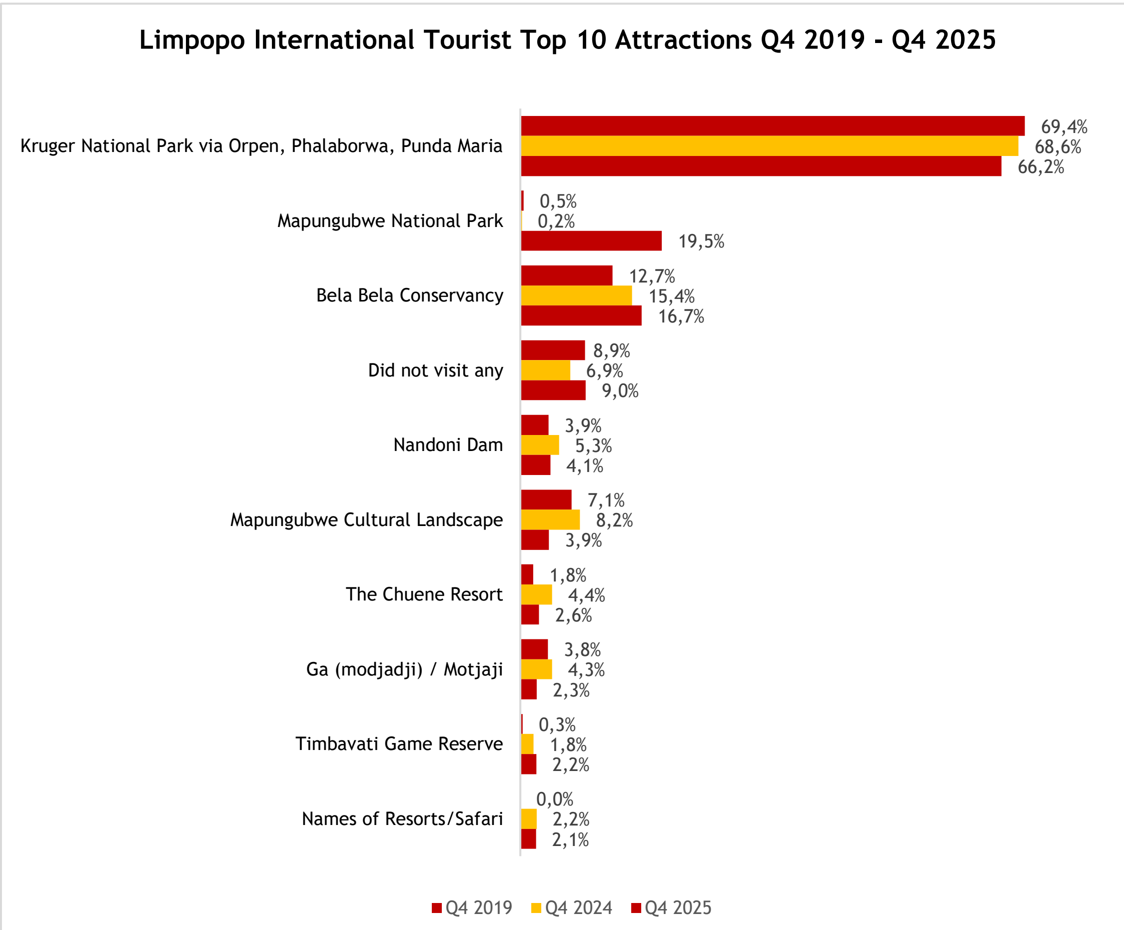
	International Tourist Arrivals (Millions)	Total Direct Foreign Spend (ZAR Bn)	Ratio % Spend / % Arrivals
Total Arrivals	2.9	28.8	
Limpopo Total	0.1	1.5	
Share	4.1%	5.0%	124.1%

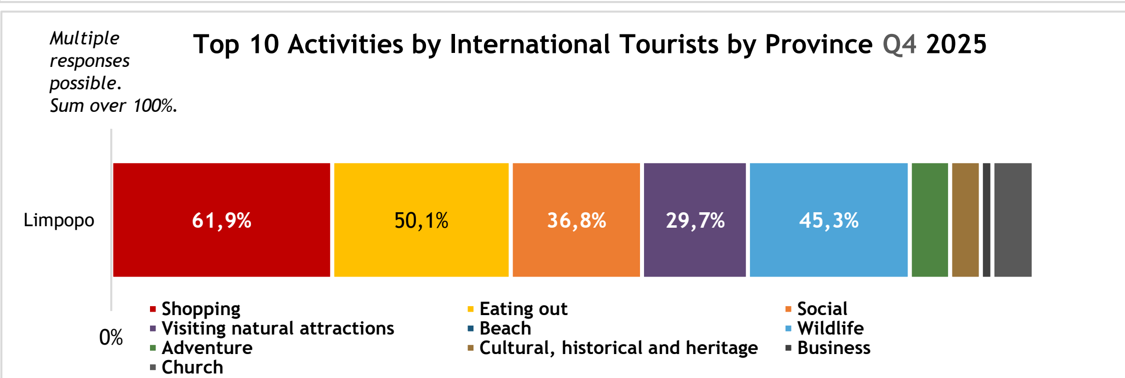
LIMPOPO

116.4 THOUSAND -36.4%



Nature-based attractions continue to anchor Limpopo's tourism landscape in Q4 2025, reinforcing the province's strong wildlife and outdoor positioning. Kruger National Park remains the dominant draw at 66.2%, maintaining its status as the flagship destination, while Mapungubwe National Park recorded a sharp rise to 19.5%, signalling renewed interest in heritage and conservation-linked sites. Bela Bela Conservancy also strengthened its presence at 16.7%, reflecting sustained recovery and growing appeal among international visitors. Activity patterns align closely with these trends, with shopping (61.9%) and eating out (50.1%) complemented by high engagement in wildlife experiences (45.3%) and visits to natural attractions (29.7%). Together, these dynamics highlight Limpopo's distinctive combination of wildlife-driven tourism, scenic exploration, and socially influenced travel behaviour.

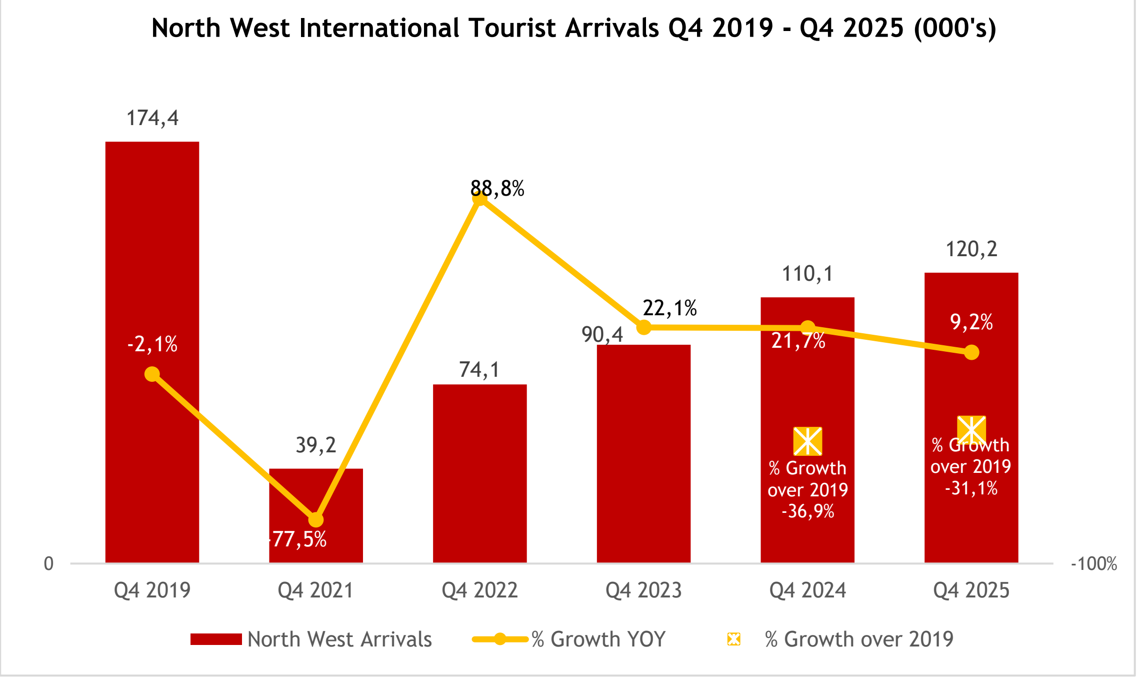




NORTH WEST

120.2 THOUSAND +9.2%

International arrivals to North West continued their upward trajectory in Q4 2025, reaching 120.2 thousand, reflecting a +9.2% year-on-year increase, although volumes remain -31.1% below Q4 2019 levels. The province's visitor mix is still strongly concentrated in regional markets, led by Botswana (32.9%), Lesotho (14.9%), and Zimbabwe (11.1%), which together account for a substantial share of inbound travel. While Botswana remains the largest source despite a significant long-term decline (-60.6% vs. 2019), Zimbabwe has shown sustained growth (+39.9%), and Mozambique emerged as a key growth market (+135.5% YoY; +101.2% vs. 2019). Lesotho, however, recorded a year-on-year contraction (-5.6%), indicating some volatility within core regional flows. Among overseas markets, the USA (4.9%) and UK (5.1%) continue to contribute meaningful shares, supported by solid growth over both short- and longer-term periods. Despite remaining below pre-pandemic levels, North West's tourism performance is supported by resilient regional demand and a gradually diversifying international market base.

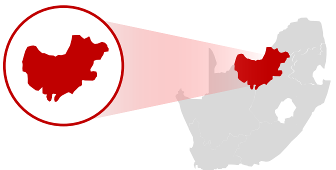


North West International Tourist Arrivals by Top 10 Source Markets Q4 2025

North West Top 10 Markets Q4 2025	Tourist Arrivals Q4 2025	% Share Q4 2025	% Growth Q4 2019 - Q4 2025	% Growth Q4 2024 - Q4 2025
Botswana	39 520	32.9%	-60.6%	9.7%
Lesotho	17 923	14.9%	-33.6%	-5.6%
Zimbabwe	13 326	11.1%	39.9%	-20.7%
Mozambique	9 219	7.7%	101.2%	135.5%
UK	6 081	5.1%	41.4%	23.0%
USA	5 897	4.9%	49.7%	17.9%
Germany	4 356	3.6%	-6.3%	9.5%
Brazil	2 057	1.7%	132.8%	103.0%
The Netherlands	1 731	1.4%	4.4%	45.5%
Australia	1 722	1.4%	59.2%	-0.5%
All North West Arrivals	120 226	4.2%	-31.1%	9.2%

NORTH WEST

120.2 THOUSAND +9.2%



A gradually strengthening leisure component is becoming more evident in North West's tourism mix in Q4 2025, providing a modest counterbalance to its reliance on cross-border travel. Holiday travel accounts for 24.4% of arrivals, reflecting a +0.9 percentage point increase year-on-year and a notable +8.5 point rise compared to 2019, indicating steady recovery in discretionary travel. Business-related travel also maintains a meaningful presence, with Business Travellers contributing 14.6% despite a -8.1pp year-on-year decline, while MICE (4.0%) shows moderate growth (+0.8pp YoY; +3.5pp vs. 2019). In contrast, Business Shopping remains subdued at 2.0%, reflecting a pronounced long-term contraction (-17.9pp vs. 2019). Visiting Friends and Relatives (VFR), at 50.6%, remains the largest segment but offers limited insight into recent changes given its dominance across most provinces. Accommodation patterns reinforce this composition, with 76.6% of bed nights spent with friends and family, rising by +27.1pp year-on-year. Hotels (4.8%), guest houses (2.2%), and self-catering (1.4%) remain secondary, while game lodges (3.7%) indicate steady interest in nature-based stays. Overall, North West reflects a market still heavily reliant on cross-border and social travel, with only gradual and limited growth in leisure and formal accommodation segments.

Share of North West Tourist Arrivals by Main Purpose Q4 2025

North West	VFR	Holiday	Business Traveller	Business Shopping	MICE	Personal Shopping	Medical	Religion
Q4 2025	50.6%	24.4%	14.6%	2.0%	4.0%	1.9%	0.3%	3.0%
Percentage Point Change 24-25	4.4	0.9	-8.1	1.7	0.8	-1.6	-0.1	0.5
Percentage Point Change 19-25	9.9	8.5	4.3	-17.9	3.5	-4.8	-1.0	2.0

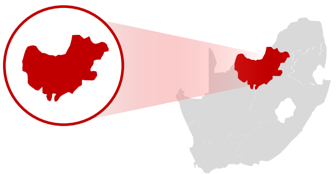
Share of Accommodation Types in North West Q4 2025

North West	Friends & Family	Hotels	Guest House	Self Catering	BnB	Air BnB	Game Lodge	Backpacker	Camping	Other
(% of bed nights) Q4 2025	76.6%	4.8%	2.2%	1.4%	1.1%	0.1%	3.7%	0.0%	0.6%	9.6%
Percentage Point Change 24-25	27.1	2.1	0.1	-2.6	0.6	0.0	0.5	-0.9	0.3	-3.4
Percentage Point Change 19-24	22.3	1.1	0.2	-2.3	0.6	0.1	1.7	-0.2	0.2	3.2

	International Tourist Arrivals (Millions)	Total Direct Foreign Spend (ZAR Bn)	Ratio % Spend / % Arrivals
Total Arrivals	2.9	28.8	
North West Total	0.1	0.6	
Share	4.2%	2.2%	53.0%

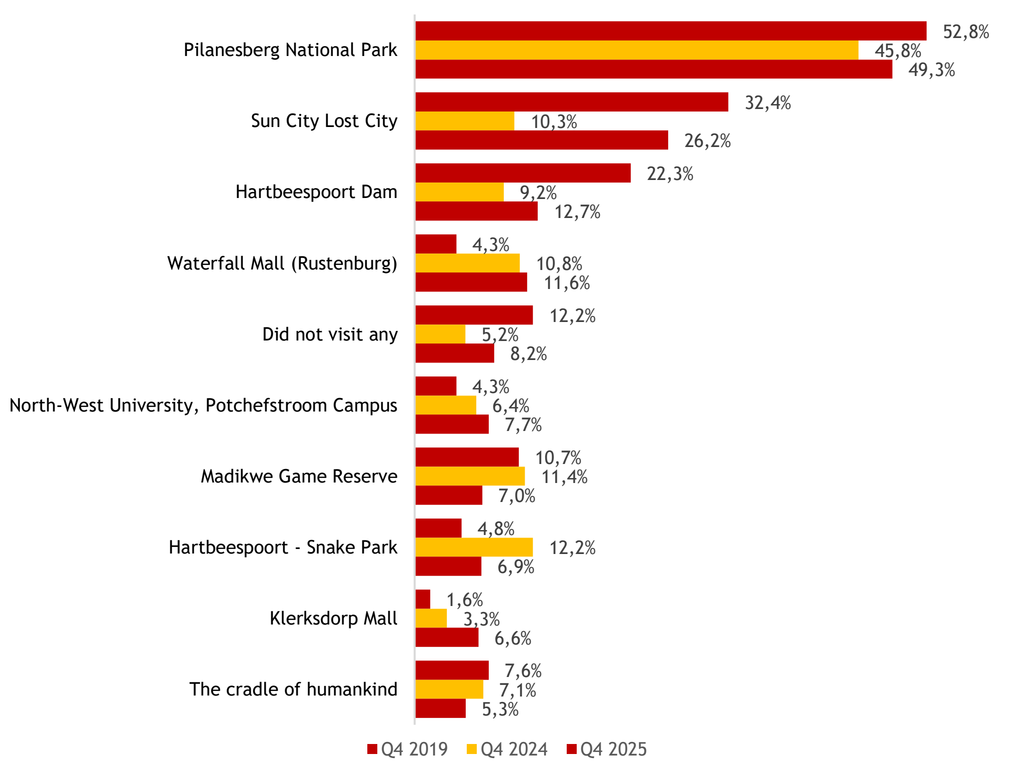
NORTH WEST

120.2 THOUSAND +9.2%



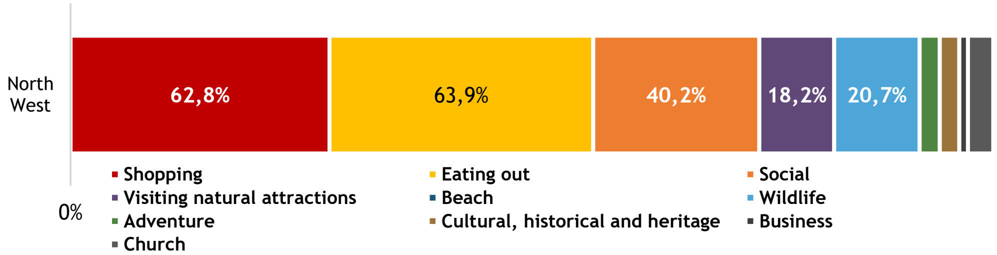
Tourism patterns in North West during Q4 2025 centre on a small group of dominant attractions, where wildlife, resort, and retail experiences collectively drive movement across the province. Pilanesberg National Park leads at 49.3%, reinforcing its role as the province’s primary drawcard, while Sun City Lost City has rebounded to 26.2%, indicating renewed interest in resort-based experiences. Hartbeespoort Dam attracts 12.7% of visitors, supported by recovery in leisure and day-trip activity, while Waterfall Mall (11.6%) and Klerksdorp Mall (6.6%) underline the continued role of retail nodes. Additional sites such as North-West University (7.7%) and Madikwe Game Reserve (7.0%) contribute further depth, though participation remains more limited. Activity patterns align with these behaviours, with eating out (63.9%) and shopping (62.8%) leading participation, supported by social activities (40.2%) and wildlife engagement (20.7%). Lower but consistent participation in adventure (4.9%), cultural and heritage (4.7%), and business-related activities (2.1%) reflects a secondary layer of engagement across the province’s tourism offering.

North West International Tourist Top 10 Attractions Q4 2019 - Q4 2025



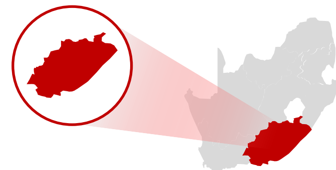
Multiple responses possible. Sum over 100%.

Top 10 Activities by International Tourists by Province Q4 2025



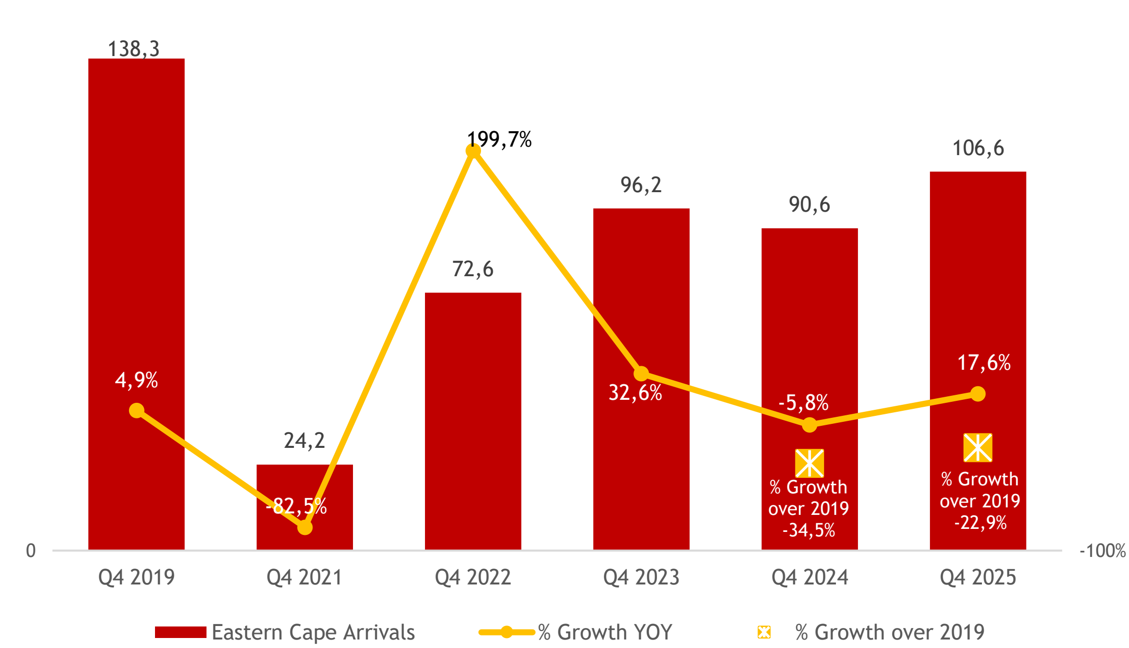
EASTERN CAPE

106.6 THOUSAND +17.6%



Eastern Cape's international tourism performance in Q4 2025 reflects a measured recovery trajectory, with arrivals reaching 106.6 thousand, up +17.6% year-on-year, although still -22.9% below Q4 2019 levels. The province continues to draw a mix of regional and long-haul visitors, with Zimbabwe leading at 17.5% of arrivals and maintaining exceptionally strong long-term growth (+848.0% vs. 2019). Germany (12.8%) and the UK (11.1%) follow as key overseas contributors, both recording positive year-on-year gains (+10.3% and +23.3%, respectively) despite remaining below pre-pandemic levels. The USA (6.0%) and the Netherlands (5.2%) also show steady recovery momentum, supported by moderate annual growth. Notably, Mozambique (+366.4% YoY) and eSwatini (+159.0% YoY) recorded sharp increases, contributing to a more diversified source mix. While several established markets are yet to fully recover, the combination of strong regional inflows and improving long-haul demand signals a progressively broadening recovery base across the province.

Eastern Cape International Tourist Arrivals Q4 2019 - Q4 2025 (000's)

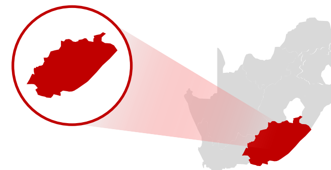


Eastern Cape International Tourist Arrivals by Top 10 Source Markets Q4 2025

Eastern Cape Top 10 Markets Q4 2025	Tourist Arrivals Q4 2025	% Share Q4 2025	% Growth Q4 2019 - Q4 2025	% Growth Q4 2024 - Q4 2025
Zimbabwe	18 637	17.5%	848.0%	40.4%
Germany	13 661	12.8%	-60.3%	10.3%
UK	11 875	11.1%	-27.3%	23.3%
USA	6 352	6.0%	-26.7%	9.1%
The Netherlands	5 493	5.2%	-45.2%	8.1%
Lesotho	4 403	4.1%	-2.0%	-44.4%
France	3 978	3.7%	-43.0%	9.3%
Australia	3 311	3.1%	-34.3%	1.6%
Mozambique	3 097	2.9%	1764.5%	366.4%
eSwatini	2 773	2.6%	107.9%	159.0%
All Eastern Cape Arrivals	**106 592**	**3.7%**	**-22.9%**	**17.6%**

EASTERN CAPE

106.6 THOUSAND +17.6%



A more even distribution of travel purposes emerges in Q4 2025, with holiday travel leading at 43.2% despite a marginal -0.1 percentage point change from 2024 and a substantial -24.7pp gap relative to 2019. Visiting Friends and Relatives (VFR) follows at 31.7%, declining by -8.4pp year-on-year but remaining significantly elevated compared to pre-pandemic levels (+16.1pp vs. 2019). Business travel (7.4%) continues to strengthen (+4.4pp YoY), while MICE (1.3%) and religion (0.1%) contribute smaller but stable shares, reflecting a gradually widening demand mix. Accommodation choices align with this evolving profile. Stays with friends and family account for 48.6% of bed nights, rising by +11.7pp year-on-year and +30.7pp above 2019, though notably lower than earlier peaks. Hotels (7.0%), guest houses (3.5%), and self-catering (5.4%) collectively indicate a modest recovery in formal accommodation, while game lodges (3.8%) and BnBs (1.2%) provide supplementary options. The “other” category stands out at 28.7%, pointing to a widening spread of alternative accommodation usage across the province.

Share of Eastern Cape Tourist Arrivals by Main Purpose Q4 2025

Eastern Cape	VFR	Holiday	Business Traveller	Business Shopping	MICE	Personal Shopping	Medical	Religion
Q4 2025	31.7%	43.2%	7.4%	0.0%	1.3%	0.0%	0.5%	0.1%
Percentage Point Change 24-25	-8.4	-0.1	4.4	1.2	1.8	0.9	-0.3	0.7
Percentage Point Change 19-25	16.1	-24.7	8.6	0.6	0.8	0.3	0.2	0.6

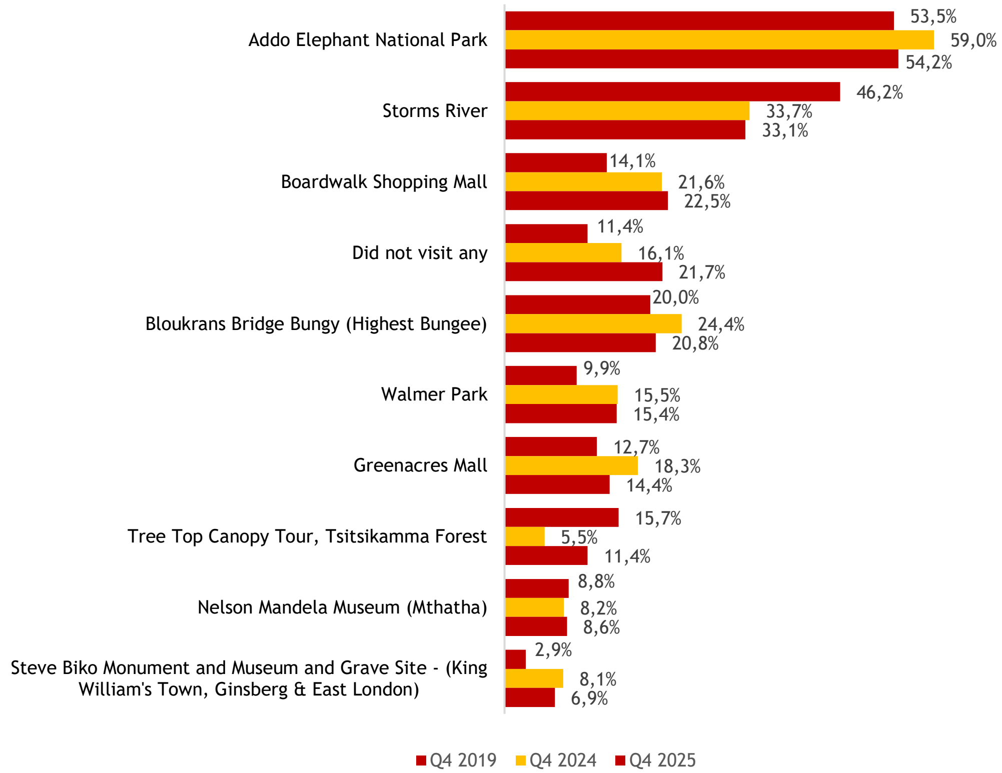
Share of Accommodation Types in Eastern Cape Q4 2025

Eastern Cape	Friends & Family	Hotels	Guest House	Self Catering	BnB	Air BnB	Game Lodge	Backpacker	Camping	Other
(% of bed nights) Q4 2025	48.6%	7.0%	3.5%	5.4%	1.2%	1.4%	3.8%	0.2%	0.0%	28.7%
Percentage Point Change 24-25	11.7	2.4	0.4	2.3	-0.3	1.1	-0.4	-0.9	-0.8	5.0
Percentage Point Change 19-24	30.7	-3.5	-4.9	-12.7	-0.6	-1.0	0.5	-5.7	-1.0	2.2

	International Tourist Arrivals (Millions)	Total Direct Foreign Spend (ZAR Bn)	Ratio % Spend / % Arrivals
Total Arrivals	2.9	28.8	
Eastern Cape Total	0.1	1.1	
Share	3.7%	3.8%	102.0%

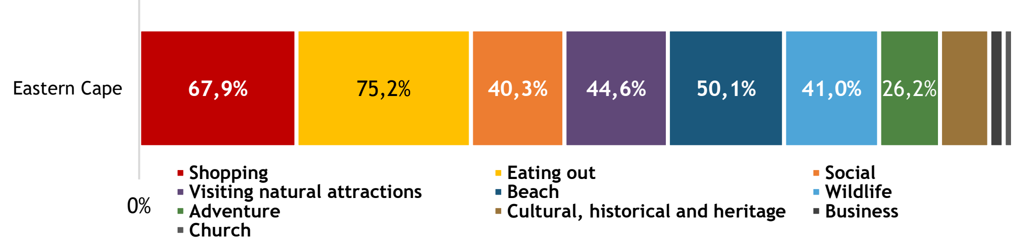
A combination of established attractions and shifting visitor choices defines activity in the Eastern Cape during Q4 2025. Addo Elephant National Park remains the leading draw at 54.2%, sustaining its position at the centre of the province's offering. Storms River follows at 33.1%, maintaining solid interest despite a gradual easing over time, while Boardwalk Shopping Mall (22.5%) and Bloukrans Bridge Bungy (20.8%) continue to attract meaningful shares, reflecting a blend of nature, retail, and adventure experiences. Notably, 21.7% of visitors did not engage with any formal attraction, indicating a sizeable portion of informal or unstructured travel. Activity participation reflects this spread of experiences: eating out (75.2%) and shopping (67.9%) remain dominant, complemented by beach visits (50.1%), social activities (40.3%), and strong involvement in natural attractions (44.6%) and wildlife (41.0%). Additional participation in adventure (26.2%) and cultural and heritage activities (21.3%) points to a broad, multi-layered tourism experience across the province.

Eastern Cape International Tourist Top 10 Attractions Q4 2019 - Q4 2025



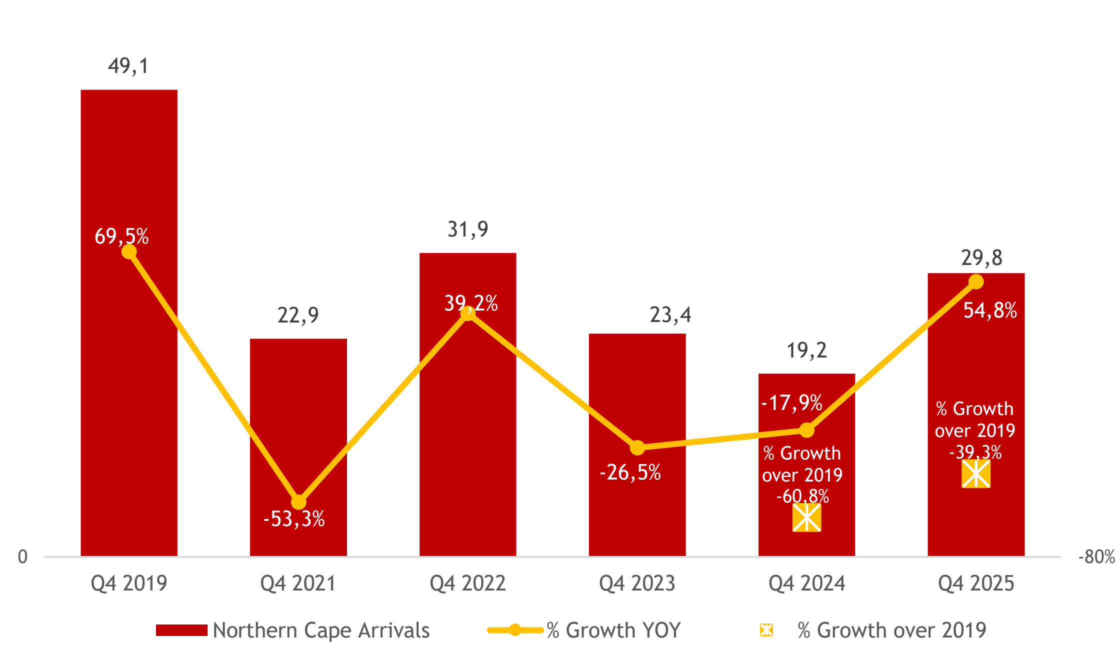
Multiple responses possible. Sum over 100%.

Top 10 Activities by International Tourists by Province Q4 2025



Year-on-year growth in Q4 2025 places Northern Cape arrivals at 29.8 thousand, reflecting a strong +54.8% increase from 2024, while still remaining -39.3% below 2019 levels. The province continues to be shaped largely by cross-border inflows, with Lesotho (23.6%) and Namibia (23.3%) together accounting for nearly half of all arrivals. Zimbabwe also contributes a substantial 20.7%, supported by very strong annual growth (+258.4%), reinforcing the importance of nearby markets in driving volumes. Among overseas sources, the UK (5.2%) recorded solid year-on-year growth (+128.6%), while Germany (3.4%) and Botswana (2.4%) also posted gains. In contrast, the USA (4.5%) declined by -20.0% year-on-year, highlighting variation across key markets. Overall, current year-on-year gains are concentrated in cross-border travel alongside selective improvements in long-haul segments, while total volumes remain below 2019 benchmarks.

Northern Cape International Tourist Arrivals Q4 2019 - Q4 2025 (000's)

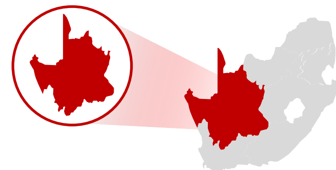


Northern Cape International Tourist Arrivals by Top 10 Source Markets Q4 2025

Northern Cape Top 10 Markets Q4 2025	Tourist Arrivals Q4 2025	% Share Q4 2025	% Growth Q4 2019 - Q4 2025	% Growth Q4 2024 - Q4 2025
Lesotho	7 034	23.6%	31.8%	109.8%
Namibia	6 944	23.3%	-74.5%	23.3%
Zimbabwe	6 156	20.7%	#DIV/0!	258.4%
UK	1 550	5.2%	-3.6%	128.6%
USA	1 348	4.5%	-8.0%	-20.0%
Germany	1 015	3.4%	-66.6%	30.4%
Botswana	726	2.4%	-56.0%	35.8%
Malawi	708	2.4%	3.2%	691.9%
eSwatini	626	2.1%	6.5%	#DIV/0!
Russian Federation	438	1.5%	#DIV/0!	-25.8%
All Northern Cape Arrivals	29 777	1.0%	-39.3%	54.8%

NORTHERN CAPE

29.8 THOUSAND +54.8%



A strong skew toward social travel defines Q4 2025, with Visiting Friends and Relatives (VFR) accounting for 54.0% of arrivals, up +11.3 percentage points from 2024 and +25.2 points above 2019. Holiday travel follows at 28.3%, declining by -5.7pp year-on-year and remaining -11.3pp below 2019 levels. Business travellers contribute 13.1%, down -7.1pp from last year but still slightly above pre-pandemic levels (+1.5pp vs. 2019), while smaller segments such as MICE (3.4%) and religion (2.4%) add limited variation to the overall composition. Accommodation usage reflects this concentration. Stays with friends and family account for 84.6% of bed nights, rising sharply by +63.8pp from 2024 and +63.1pp above 2019. Hotels (2.8%), guest houses (1.2%), and self-catering (4.5%) remain relatively small contributors, alongside game lodges (2.9%) and BnBs (0.7%). Overall, travel remains heavily centred on personal networks, with formal accommodation playing a secondary and more limited role.

Share of Northern Cape Tourist Arrivals by Main Purpose Q4 2025

Northern Cape	VFR	Holiday	Business Traveller	Business Shopping	MICE	Personal Shopping	Medical	Religion
Q4 2025	54.0%	28.3%	13.1%	2.9%	3.4%	1.4%	0.0%	2.4%
Percentage Point Change 24-25	11.3	-5.7	-7.1	0.0	-1.9	2.2	0.0	1.1
Percentage Point Change 19-25	25.2	-11.3	1.5	-7.0	-0.5	-0.4	-4.4	2.6

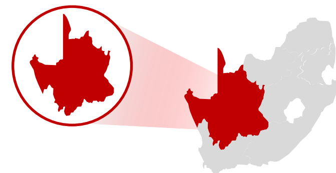
Share of Accommodation Types in Northern Cape Q4 2025

Northern Cape	Friends & Family	Hotels	Guest House	Self Catering	BnB	Air BnB	Game Lodge	Backpacker	Camping	Other
(% of bed nights) Q4 2025	84.6%	2.8%	1.2%	4.5%	0.7%	0.0%	2.9%	0.0%	1.2%	2.3%
Percentage Point Change 24-25	63.8	0.7	-1.0	4.0	-0.1	0.0	-0.3	0.0	0.3	0.5
Percentage Point Change 19-24	63.1	-0.2	-1.8	3.8	-0.4	-0.5	0.5	0.0	-1.3	-5.6

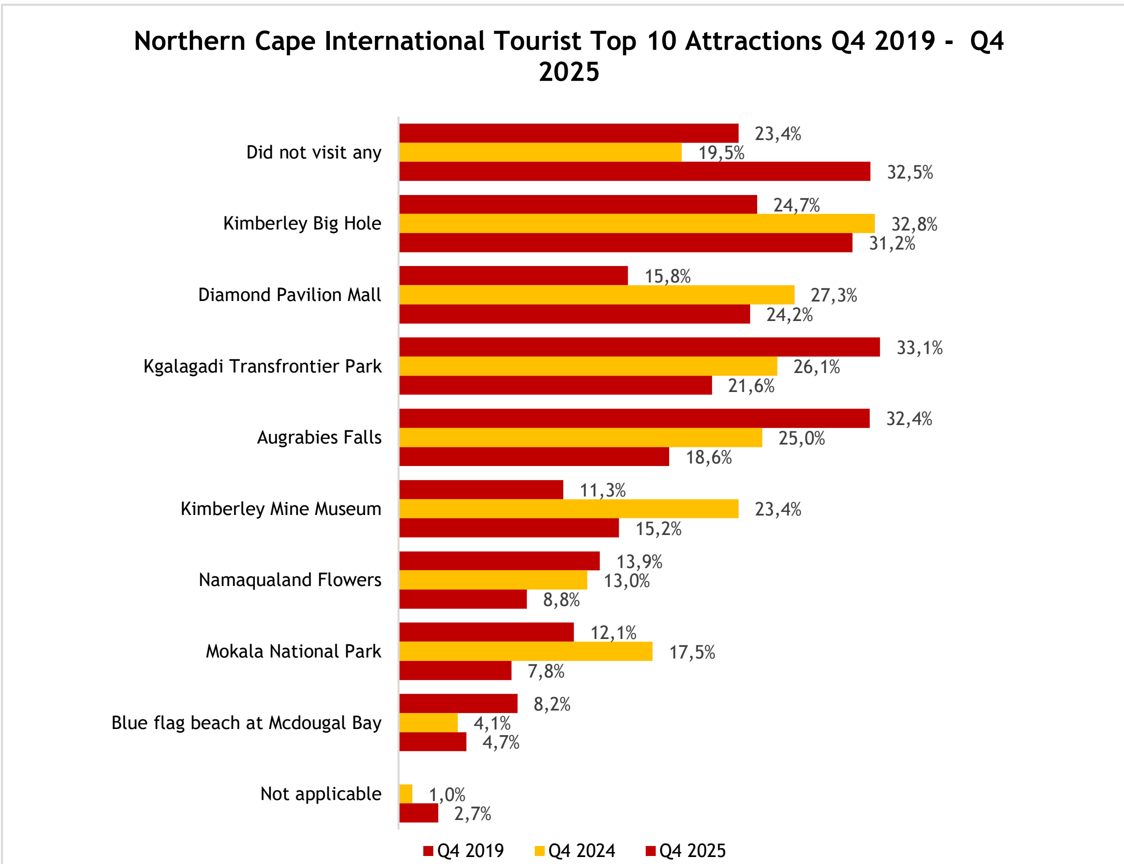
	International Tourist Arrivals (Millions)	Total Direct Foreign Spend (ZAR Bn)	Ratio % Spend / % Arrivals
Total Arrivals	2.9	28.8	
Northern Cape Total	0.0	0.4	
Share	1.0%	1.4%	132.1%

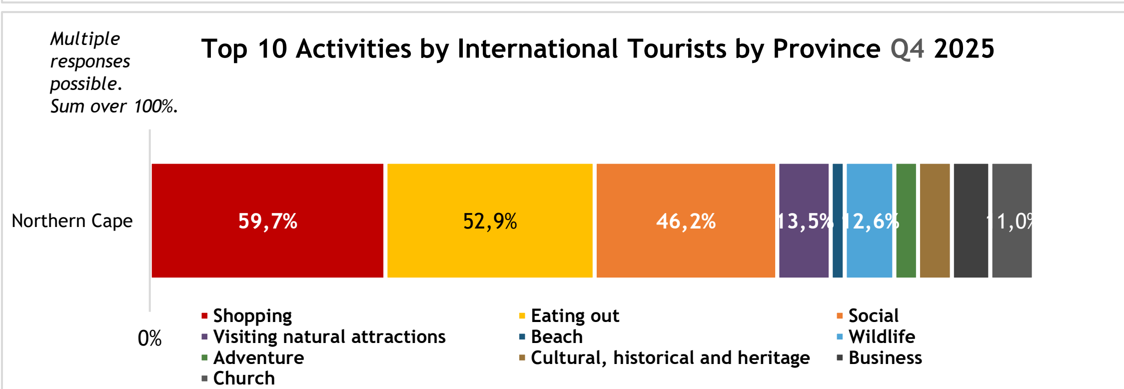
NORTHERN CAPE

29.8 THOUSAND +54.8%



Heritage landmarks and retail sites continue to anchor visitor activity in the Northern Cape during Q4 2025, with the Kimberley Big Hole leading at 31.2%, sustaining its position as the province's top attraction. Diamond Pavilion Mall follows at 24.2%, while Kgalagadi Transfrontier Park draws 21.6% of visitors, maintaining its role as a key wilderness destination. Augrabies Falls (18.6%) and the Kimberley Mine Museum (15.2%) contribute additional depth, though at more moderate levels than in prior periods. A notable 32.5% of international visitors did not visit any attraction, indicating a sizeable share of unstructured or transit-driven trips. Activity participation reflects this distribution: shopping (59.7%) and eating out (52.9%) remain the most common activities, supported by social engagement (46.2%). Wildlife viewing (12.6%) and visits to natural attractions (13.5%) remain present but comparatively subdued, reinforcing a tourism profile where heritage, retail, and social travel intersect.



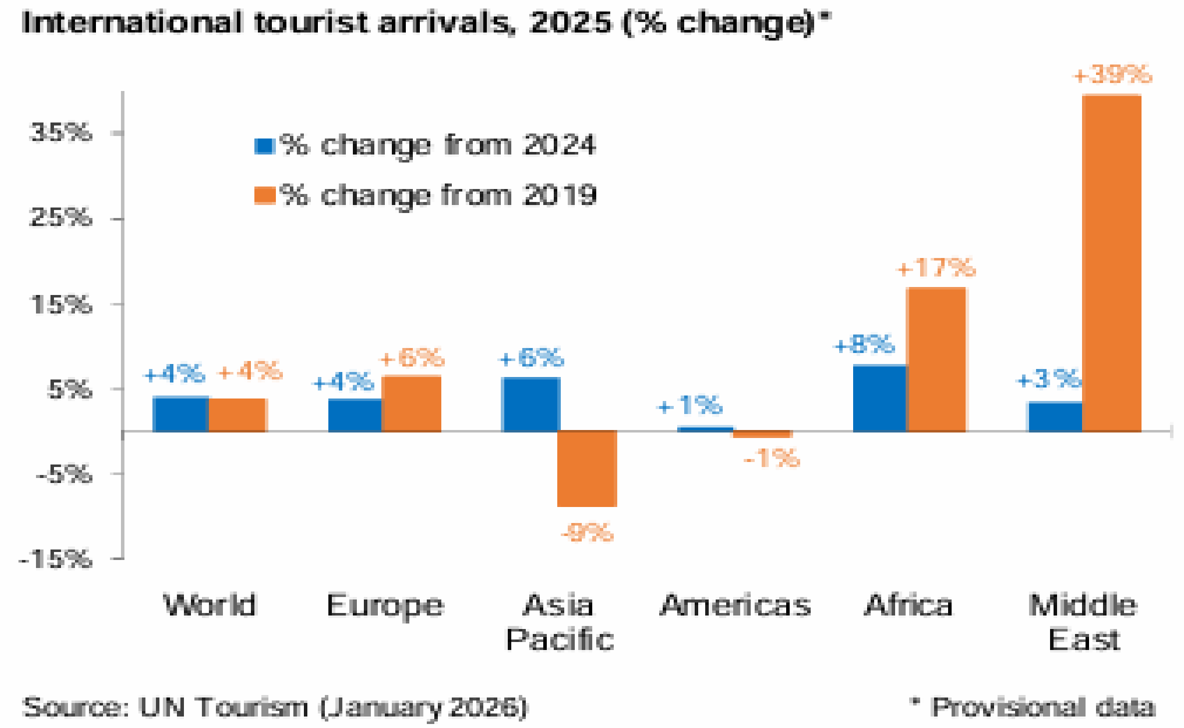


GLOBAL TOURISM OUTLOOK

GLOBAL TOURISM PERFORMANCE

+4.0% ▲

- International tourism continued its upward trajectory in 2025, with global arrivals increasing by 4% year-on-year, reaching an estimated 1.52 billion international tourists worldwide — almost 60 million more than in 2024. This marks a new record year in the post-pandemic era and confirms a return to long-term growth trends, broadly aligned with the 3% to 5% expansion forecast issued at the beginning of 2025.
- The global results reflect resilient travel demand despite elevated tourism service costs and ongoing geopolitical challenges. Growth was supported by strong performance from major source markets, the continued recovery of destinations in Asia and the Pacific, improved air connectivity, and enhanced visa facilitation measures. The fourth quarter recorded growth of approximately 3%, slightly moderating from the 4% increase observed during the Northern Hemisphere summer season.
- Tourism earnings grew faster than arrivals in many destinations, reflecting extraordinary levels of visitor spending globally.
- Against this global backdrop, South Africa's international arrivals growth of 17.7% in 2025 significantly outpaced the global average, while foreign direct spend increased by 11.6% year-on-year, positioning the country among destinations demonstrating strong recovery momentum.



Outlook for 2026

International tourism is projected to grow by 3% to 4% in 2026, reflecting a normalization of growth rates following strong post-pandemic rebounds in 2023 and 2024 and continued expansion in 2025. This outlook assumes continued recovery in Asia and the Pacific, favourable global economic conditions, moderating tourism service inflation, and no significant escalation in geopolitical tensions.

[1] https://www.unwto.org/news/international-tourism-recovers-pre-pandemic-levels-in-2024
[2] Excerpt: 'World Tourism Organization (UN Tourism) (Data as of January 2025).
[3] Excerpt: https://www.unwto.org/un-tourism-world-tourism-barometer-data

South Africa
SOUTH AFRICAN TOURISM

Technical Notes

TECHNICAL NOTES

MEASURE OF PRECISION

This section provides an overview of the standard error, confidence interval, and coefficient of variation (CV) for TFDS and Bed Nights. Estimates were computed based on a complex multi-stage survey design with stratification, clustering, and unequal weighting.

Confidence Intervals are a range of values derived from the survey data that likely contains the true population parameter (e.g. spend) with a specified level of confidence (usually 95%). Confidence intervals provide a measure of the uncertainty or precision of the survey estimate. A narrower interval indicates greater precision.
Standard Error is the standard deviation of the sampling distribution of a statistic, such as the mean or proportion. The standard error quantifies the amount of variation in the sample estimate and is used to construct confidence intervals. Smaller standard errors indicate more precise estimates.
Coefficient of Variation (CV) is a measure of relative variability, calculated as the ratio of the standard error to the mean, often expressed as a percentage. The CV allows for comparison of the precision of different metrics, regardless of their scale, by indicating the degree of variability in relation to the mean.
Sample Size (N) are the number of observations or respondents included in the survey. A larger sample size generally leads to more precise estimates, reducing the standard error and margin of error. It is a fundamental determinant of the precision of survey results.

Alphabetic	CV	Interpretation
A.	0.0% - 0.5%	Reliable enough for most purposes
B.	0.6% - 1.0%	
C.	1.1% - 2.5%	
D.	2.6% - 5.0%	
E.	5.1% - 10.0%	
F.	10.1 %- 16.5%	
G.	16.6% - 25.0%	Use with caution
H.	25.1% - 33.4%	
I.	+33.5%	Data not published

Measures of precision for Total Spend (TFDS) and Bed Nights
n=valid of the total arrival tourists for the quarter

A. FOR THE ENTIRE DEPARTURE SURVEY

Variable	N	Mean	95% Confidence Interval		Standard Error	of Variation
Total Spend (TFDS)	2 654 150	R10 866	R10 837	R10 896	15.137	0.139
Total Bed Nights	2 778 498	16.19	16.16	16.21	0.013	0.083

B. FOR OVERSEAS

Variable	N	Mean	95% Confidence Interval		Standard Error	of Variation
Total Spend (TFDS)	89 714	R20 739	R20 494	R20 983	124.715	0.601
Total Bed Nights	89 750	16.46	16.21	16.71	0.128	0.779

C. FOR AFRICA

Variables	N	Mean	95% Confidence Interval		Standard Error	of Variation
Total Spend (TFDS)	1 909 615	R5 504	R5 481	R5 527	11.629	0.211
Total Bed Nights	2 033 003	16.90	16.87	16.93	0.016	0.092

SAMPLING

The unit of measurement for this survey is an international tourist, defined according to the global standard set by the United Nations World Tourism Organisation (UNWTO).

The research universe encompasses all individuals eligible to participate in the Departure Survey, with respondents selected based on six criteria:

i. The respondent must not be a South African resident.

ii. The respondent must have spent at least one night in South Africa.

iii. The respondent must not have spent more than 365 days in South Africa.

iv. For the airport survey, the respondent must have spent their time outside the airport.

v. The respondent must not have received any income during their trip to South Africa.

vi. The respondent must not have been interviewed by South African Tourism in the past six months.

The availability of this participant universe at airports is strictly governed by adherence to a pre-agreed interviewing schedule. Each month, the survey is conducted over two weeks at ORTIA and CTIA. Stratification by region of origin and market, aligned with airline schedules, also influences the randomisation of the sampling process. Despite this overall stratified sampling design, all respondents are filtered to ensure they meet the above criteria.

To manage interviews effectively, airports are divided into sampling zones where interviewers are allocated specific areas where potential respondents congregate while waiting to board their flights. Respondents are approached after they have completed immigration formalities.

While airport survey interviews occur in departure lounges after passengers have completed exit formalities, land border post surveys present additional complexities due to a lack of structured waiting periods before departure. Successful data collection has been achieved by intercepting and randomly sampling tourists at three key intervention points: arrival at the border gate, processing of formalities, and preparation for departure from the border gate.

At each of these points, interviewers approach every fifth person (or party). Only one individual from each party traveling together is recruited for participation. At the arrival point, a pre-screening phase occurs where no interviews are conducted; instead, respondents’ willingness to participate is gauged while introducing survey details. In-queue sampling consists of both a pre-screening phase and a confirmation phase for individuals already screened upon entry at the land border post. Actual interviews take place at designated interviewing stations equipped with tables and chairs after respondents exit formalities.

METHODOLOGY & FIELDWORK

Methodology

To gather the necessary information, quantitative research serves as the core methodology for this study. Data collection is primarily conducted using structured questionnaires, which consist mainly of pre-coded questions alongside a few open-ended questions. The open-ended questions aim to provide deeper insights into factors influencing the phenomena under investigation.

The methodology employed for the Departure Survey is Tablet-Assisted Personal Interviewing (TAPI/CAPI). This approach involves face-to-face interviews where data is entered directly into a tablet, eliminating the need for paper forms. Trained and experienced interviewers conduct these interviews using concise Departure Survey questionnaires. The questionnaires are translated into all key market languages, and the interviewing team comprises multilingual individuals fluent in necessary foreign languages, thereby minimising communication errors.

Fieldwork

The Departure Survey fieldwork targets tourists as they exit the country through 12 border posts and two major airports: OR Tambo International Airport (ORTIA) and Cape Town International Airport (CTIA). Interviews are conducted in the various languages predominantly spoken at these exit points, as well as in languages chosen by respondents from different regions around the world. Given that most visitors arrive and depart primarily by air and through land border posts, the Departure Survey includes:

i. Airport Intervention

ii. Land Border Post Intervention

TECHNICAL NOTES

WEIGHTING

The survey data is weighted at the country level using the South African Home Affairs Monthly Tourist Mode Arrival Data received from Statistics South Africa (STATS SA).

Country Tourists Mode Arrivals are distinguished mainly into either Total Air Arrivals or Total Road Arrivals. Consequently, tourists from one country may have different weights depending on whether their mode of arrival in South Africa is Air or Road.

The individuals' weights are derived by dividing the Monthly Country Tourist Mode Counts for Air or Road arrivals by Survey Data variable 'Country of Residence' frequencies for Airports or LBP, respectively.

NB: A special case exists for China, Hong Kong, and Macao that ought to be combined into one when weights are being calculated – and for any other subsequent analysis.

NORMALISING SPEND DATA

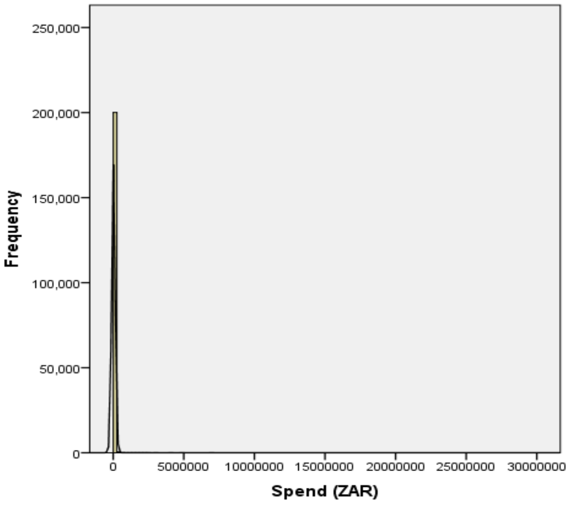
SA Tourism reviewed its performance over the past four years. In those four years, we have grown the survey of air arrivals from a summer and winter survey to a monthly survey at two airports and started surveying land arrivals at the 10 busiest land border posts every month. The review provided an opportunity to measure what our marketing has achieved in the past four years and review the departure survey methodology using trend data.

Of particular concern to us was the spend data, which we have been cleaning every quarter. A large number of responses fall below the mean, with several large outliers. Analysing the data confirmed that the responses were valid as the low spenders were mainly from SADC and stayed for only one or two nights. The higher spenders from SADC bought items such as houses and motor cars. As expected, people who stay longer spend more.

Furthermore, spend is seasonal and varies from month to month. Therefore, outliers also vary from one month to the next. The rules for normalising data must be consistent and take these seasonal variations into account. Analysis of spend data showed that the distribution of spend closely resembles an exponential curve rather than a normal curve, which we have been using in our cleaning rules.

SA spend distribution is much closer to an exponential curve than a normal curve; the majority of responses are below the mean with a few very high outliers

SA Spend 2017-2021
(All Responses, unweighted)



- Mean = 18,261.41
- Std. Dev. = 124,022.201
- N = 200,817

Source: 2017-2021 SAT Departure Survey.

NORMALISING SPEND DATA CONTINUED

Transform the log values back to spend values using the following formula:

Exclude all variables that fall outside the cut-off values.
The normalization process leads to the following results for 2021:

Log_Low_cut_off = Mean – 3*Stdev
Log_Upper_cut_off = Mean + 3*Stdev

Lower-cut-off Value = 10^(Log_Low_cut_off)
Upper-cut-off Value = 10^(Log_Upper_cut_off)

Based on this information, SA Tourism has revised the methodology for normalising spend data.

This chapter provides the details of how the data has been normalised.

SA Tourism now normalises the spend data by eliminating 3-standard deviations from the logarithmic mean.

y = log10 (x)

Compute log of spend variable using the formula above

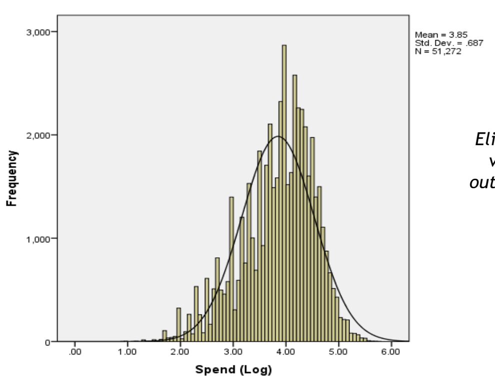
Calculate the mean of the result obtained in (1) above.

Determine the cut-off criteria using the following formula:

SA Spend
Logarithmic Values

Plotting the log of the SA spend produces a normal distribution allowing us to eliminate values outside 3 SDs from the mean

Log Spend in SA w/o Capex
(unweighted)



Minimum	Mean	Maximum	Std. Deviation
0.91	3.85	5.79	0.687

Eliminate values outside +3 SDs

Corresponding Spend Values after elimination
(unweighted)

- Min. Spend = ZAR 0
- Mean Spend = ZAR 17,965
- Max Spend = ZAR 620,150
- N = 51,272

Source: 2021 SAT Departure Survey.

APPENDIX

INTERNATIONAL TOURISTS ARRIVALS

APPENDIX

INTERNATIONAL TOURIST ARRIVALS				
	Q4 2023	Q4 2024	Q4 2025	% YOY GROWTH
Africa	**1 730 845**	**1 765 654**	**2 141 076**	**21.3%**
Botswana	117 510	117 713	123 042	4.5%
Lesotho	279 994	284 402	343 032	20.6%
Malawi	41 076	53 169	53 311	0.3%
Mozambique	355 232	396 640	556 258	40.2%
Namibia	45 457	47 588	49 797	4.6%
Swaziland	206 219	224 103	264 910	18.2%
Zambia	42 640	41 410	52 077	25.8%
Zimbabwe	562 578	510 820	591 731	15.8%
Angola	9 703	9 680	10 731	10.9%
Dem Rep of Congo	8 209	8 798	12 511	42.2%
Ethiopia	2 057	2 074	3 243	56.4%
Ghana	7 152	11 170	12 574	12.6%
Kenya	13 849	15 301	19 435	27.0%
Nigeria	5 191	6 397	7 960	24.4%
Tanzania	10 460	11 455	13 938	21.7%
Uganda	4 065	3 987	4 779	19.9%
Other Africa	19 453	20 947	21 747	3.8%
Asia	**51 171**	**51 211**	**52 916**	**3.3%**
China including Hong Kong	8 894	9 907	7 959	-19.7%
India	19 378	17 549	15 559	-11.3%
Japan	4 132	4 471	5 334	19.3%
Malaysia	1 412	1 898	1 933	1.8%
Singapore	2 066	2 199	2 506	14.0%
Rep of Korea (South)	3146	3055	3722	21.8%
Other Asia	12 143	12 132	15 903	31.1%
Australasia	**27 727**	**34 657**	**38 635**	**11.5%**
Australia	22 301	28 483	32 090	12.7%
New Zealand	5 332	6 036	6 473	7.2%
Other Australasia	94	138	72	-47.8%
CENTRAL & SOUTH AMERICA	**16 560**	**19 782**	**25 747**	**30.2%**
Argentina	1 073	1 271	1 632	28.4%
Brazil	10 544	13 271	18 045	36.0%
Chile	864	714	905	26.8%
Other Central & South America	4 079	4 526	5 165	14.1%
Europe	**382 219**	**400 540**	**478 056**	**19.4%**
Austria	7 421	7 847	9 639	22.8%
Belgium	13 987	13 999	15 812	13.0%
Denmark	5 256	5 361	6 004	12.0%
Finland	2 371	2 299	2 539	10.4%
France	34 897	36 236	41 812	15.4%
Germany	82 991	93 617	116 524	24.5%
Ireland	7 890	8 325	10 169	22.2%
Italy	12 575	12 941	13 895	7.4%
Netherlands	40 732	40 666	44 265	8.9%
Norway	4 301	4 737	5 118	8.0%
Portugal	5 044	5 058	5 972	18.1%
Russian Fed	9 629	11 073	16 441	48.5%
Spain	8 060	7 459	8 236	10.4%
Sweden	9 284	9 227	11 310	22.6%
Switzerland	15 299	15 435	18 384	19.1%
Turkey	3 296	3 882	4 522	16.5%
UK	104 091	107 069	126 770	18.4%
Other Europe	15 095	15 309	20 644	34.8%
Middle East	**8 164**	**7 500**	**10 732**	**43.1%**
United Arab Emirates	490	461	809	75.5%
Other Middle East	7 674	7 039	9 923	41.0%
North America	**105 170**	**110 383**	**113 821**	**3.1%**
Canada	16 606	18 325	20 524	12.0%
USA	88 564	92 058	93 297	1.3%
UNSPECIFIED	**3 387**	**3 598**	**3 259**	**-9.4%**
TOTAL	**2 325 243**	**2 393 325**	**2 864 242**	19.7%

SPEND IN SOUTH AFRICA

APPENDIX

TOTAL FOREIGN DIRECT SPEND (TFDS) BY COUNTRY				
	Q4 2023	Q4 2024	Q4 2025	% YOY GROWTH
AFRICA	**R11 493 500 001**	**R11 765 301 806**	**R12 371 234 462**	**5.2%**
Botswana	R539 760 405	R232 101 285	R352 995 036	52.1%
Lesotho	R766 121 859	R705 599 458	R843 760 287	19.6%
Malawi	R775 510 063	R1 083 154 366	R904 831 903	-16.5%
Mozambique	R1 246 907 429	R1 381 768 578	R1 464 661 251	6.0%
Namibia	R351 659 983	R470 480 984	R541 601 356	15.1%
Swaziland	R476 891 863	R334 786 085	R391 122 114	16.8%
Zambia	R780 225 176	R1 204 761 779	R953 000 573	-20.9%
Zimbabwe	R5 030 706 578	R4 542 352 581	R5 058 719 932	11.4%
Angola	R230 899 582	R245 265 901	R271 430 265	10.7%
DRC	R253 481 672	R204 213 316	R204 486 315	0.1%
Ethiopia	R29 713 611	R24 299 304	R39 245 748	61.5%
Ghana	R153 495 230	R185 251 832	R253 710 400	37.0%
Kenya	R240 046 147	R251 623 707	R232 611 224	-7.6%
Nigeria	R101 126 228	R116 683 779	R153 671 513	31.7%
Tanzania	R93 787 732	R195 943 414	R251 144 789	28.2%
Uganda	R96 876 335	R74 356 381	R111 094 177	49.4%
Other Africa	R326 290 107	R512 659 057	R343 147 578	-33.1%
ASIA	**R864 492 431**	**R933 109 159**	**R958 048 592**	**2.7%**
China including Hong Kong	R194 520 229	R223 811 952	R174 359 710	-22.1%
India	R352 853 106	R294 648 076	R314 366 142	6.7%
Japan	R65 857 065	R79 198 580	R93 833 979	18.5%
Malaysia	R17 901 543	R28 235 521	R41 274 599	46.2%
Singapore	R40 954 232	R52 404 907	R44 114 218	-15.8%
South Korea	R51 854 180	R44 507 455	R51 002 048	14.6%
Other Asia	R140 552 076	R210 302 668	R239 097 896	13.7%
AUSTRALASIA	**R645 320 394**	**R750 485 771**	**R891 768 585**	**18.8%**
Australia	R511 791 349	R612 662 928	R746 211 675	21.8%
New Zealand	R132 916 510	R137 594 104	R145 240 341	5.6%
Other Australasia	R612 535	R228 739	R316 569	-
CENTRAL & SOUTH AMERICA	**R321 255 269**	**R354 797 831**	**R510 182 677**	**43.8%**
Argentina	R29 474 502	R30 127 531	R35 772 251	18.7%
Brazil	R222 513 007	R246 369 180	R368 445 220	49.6%
Chile	R20 130 013	R13 657 493	R26 868 087	96.7%
Other Central & South America	R49 137 747	R64 643 627	R79 097 120	22.4%
EUROPE	**R9 115 216 321**	**R8 539 920 309**	**R10 775 313 919**	**26.2%**
Austria	R205 136 433	R154 744 010	R183 271 147	18.4%
Belgium	R278 323 578	R254 787 342	R311 775 058	22.4%
Denmark	R143 758 807	R154 552 426	R129 874 477	-16.0%
Finland	R67 616 761	R51 744 931	R61 847 094	19.5%
France	R739 242 748	R708 126 075	R871 907 130	23.1%
Germany	R1 972 380 592	R1 750 740 595	R2 529 337 012	44.5%
Ireland	R207 797 999	R217 786 115	R233 395 233	7.2%
Italy	R249 344 926	R249 155 718	R254 567 410	2.2%
Netherlands	R843 287 745	R923 571 130	R942 047 985	2.0%
Norway	R108 901 852	R82 004 541	R168 857 995	105.9%
Portugal	R115 460 768	R77 039 112	R93 283 892	21.1%
Russian Fed	R238 356 670	R254 980 317	R503 545 941	97.5%
Spain	R167 571 516	R138 439 685	R168 645 566	21.8%
Sweden	R185 447 005	R185 848 603	R213 938 081	15.1%
Switzerland	R490 328 611	R415 572 898	R430 059 726	3.5%
Turkey	R78 773 235	R73 022 646	R119 876 060	64.2%
UK	R2 725 766 247	R2 612 884 810	R3 204 521 435	22.6%
Other Europe	R297 720 827	R234 919 356	R354 562 676	50.9%
MIDDLE EAST	**R150 884 865**	**R138 207 252**	**R227 530 445**	**64.6%**
UAE	R10 923 126	R11 527 653	R14 359 272	24.6%
Other Middle East	R139 961 739	R126 679 599	R213 171 173	68.3%
NORTH AMERICA	**R2 819 984 298**	**R2 937 739 093**	**R3 106 818 702**	**5.8%**
Canada	R337 747 089	R316 850 641	R432 098 794	36.4%
USA	R2 482 237 209	R2 620 888 452	R2 674 719 908	2.1%
Other North American	R0	R0	R0	#DIV/0!
TOTAL	**R25 410 653 578**	**R25 419 561 222**	**R28 840 897 382**	**13.5%**

APPENDIX

AVERAGE SPEND				
	Q4 2023	Q4 2024	Q4 2025	% YOY GROWTH
AFRICA	**R6 900**	**R7 000**	**R6 100**	**-12.9%**
Botswana	R4 800	R2 100	R3 000	42.9%
Lesotho	R2 900	R2 600	R2 500	-3.8%
Malawi	R19 100	R20 600	R18 100	-12.1%
Mozambique	R3 600	R3 600	R2 700	-25.0%
Namibia	R7 700	R9 900	R11 000	11.1%
Swaziland	R2 300	R1 500	R1 500	0.0%
Zambia	R18 900	R29 200	R18 700	-36.0%
Zimbabwe	R9 300	R9 300	R9 300	0.0%
Angola	R30 900	R32 300	R31 000	-4.0%
DRC	R35 500	R26 400	R17 500	-33.7%
Ethiopia	R16 000	R13 200	R13 300	0.8%
Ghana	R23 000	R19 800	R26 100	31.8%
Kenya	R19 600	R19 500	R13 600	-30.3%
Nigeria	R22 700	R20 000	R20 900	4.5%
Tanzania	R14 900	R27 700	R25 600	-7.6%
Uganda	R25 400	R20 200	R25 300	25.2%
Other Africa	R20 400	R30 600	R18 900	-38.2%
ASIA	**R20 800**	**R21 900**	**R21 900**	**0.0%**
China including Hong Kong	R24 200	R24 600	R25 000	1.6%
India	R21 700	R20 400	R24 800	21.6%
Japan	R16 700	R18 500	R18 700	1.1%
Malaysia	R13 400	R16 100	R23 000	42.9%
Singapore	R21 100	R24 300	R17 800	-26.7%
South Korea	R19 100	R16 800	R16 000	-4.8%
Other Asia	R19 200	R25 500	R20 500	-19.6%
AUSTRALASIA	**R24 600**	**R23 100**	**R23 900**	**3.5%**
Australia	R24 300	R23 000	R24 000	4.3%
New Zealand	R26 300	R23 800	R23 400	-1.7%
Other Australasia	R12 500	R4 800	R7 700	-
CENTRAL & SOUTH AMERICA	**R24 500**	**R21 100**	**R22 100**	**4.7%**
Argentina	R28 600	R25 900	R22 900	-11.6%
Brazil	R24 500	R19 800	R21 300	7.6%
Chile	R24 700	R19 900	R30 900	55.3%
Other Central & South America	R22 600	R25 500	R23 400	-8.2%
EUROPE	**R26 000**	**R23 800**	**R24 700**	**3.8%**
Austria	R29 900	R22 000	R20 800	-5.5%
Belgium	R22 200	R20 200	R21 700	7.4%
Denmark	R28 500	R30 700	R22 500	-26.7%
Finland	R30 900	R24 000	R25 600	6.7%
France	R23 900	R22 300	R23 500	5.4%
Germany	R25 600	R21 800	R24 800	13.8%
Ireland	R27 400	R27 100	R23 600	-12.9%
Italy	R21 200	R21 500	R19 700	-8.4%
Netherlands	R24 000	R26 200	R23 800	-9.2%
Norway	R26 800	R28 400	R35 000	23.2%
Portugal	R32 500	R19 300	R20 100	4.1%
Russian Fed	R26 100	R25 200	R31 700	25.8%
Spain	R23 100	R20 900	R22 300	6.7%
Sweden	R20 700	R20 900	R19 500	-6.7%
Switzerland	R34 500	R29 400	R25 300	-13.9%
Turkey	R27 500	R20 600	R28 300	37.4%
UK	R27 300	R25 500	R26 100	2.4%
Other Europe	R26 000	R19 500	R22 600	15.9%
MIDDLE EAST	**R23 300**	**R23 400**	**R26 800**	**14.5%**
UAE	R22 300	R25 000	R17 800	-28.8%
Other Middle East	R23 400	R23 200	R27 800	19.8%
NORTH AMERICA	**R29 200**	**R28 800**	**R29 100**	**1.0%**
Canada	R22 800	R19 400	R23 000	18.6%
USA	R30 300	R30 600	R30 400	-0.7%
Other North American	R0	R0	R0	-
OVERALL	**R11 600**	**R11 400**	**R10 800**	**-5.3%**

APPENDIX

TFDS BY PURPOSE OF VISIST			
	Q4 2023	Q4 2024	Q4 2025
Holiday	R8 087 011 432	R7 837 169 950	R9 509 358 692
Personal Shopping	R897 912 073	R743 185 028	R713 306 443
Business Shopping	R2 243 260 390	R3 174 960 236	R2 821 731 553
Business Traveller	R2 496 434 913	R2 704 496 941	R3 206 440 740
MICE	R1 342 210 048	R1 376 584 043	R1 811 902 247
Medical	R774 068 411	R392 843 984	R498 425 527
VFR	R6 688 535 038	R6 792 257 816	R7 773 766 275
Religion	R457 755 666	R120 165 752	R167 280 415

TOTAL FOREIGN DIRECT SPEND (TFDS) AND AVERAGE SPEND BY COUNTRY – PROVINCIAL DISTRIBUTION

APPENDIX

TOTAL FOREIGN DIRECT SPEND (TFDS) - PROVINCIAL DISTRIBUTION									
	Q4 2025								
	Gauteng	Western Cape	Eastern Cape	KwaZulu- Natal	Mpumalanga	Limpopo	North West	Northern Cape	Free State
Africa	**R8 116 875 864**	**R1 316 521 761**	**R244 653 463**	**R569 268 702**	**R1 139 215 068**	**R303 915 529**	**R259 417 544**	**R65 750 646**	**R355 615 884**
Botswana	R176 214 176	R25 242 433	R14 121 102	R24 308 685	R17 001 591	R40 238 442	R47 849 376	R598 774	R7 420 455
Lesotho	R327 313 427	R113 410 443	R11 223 200	R63 356 818	R4 560 269	R2 579 529	R21 222 465	R10 507 454	R289 586 680
Malawi	R792 883 582	R38 482 674	R20 344 940	R30 737 956	R35 480	R5 228 282	R10 974 350	R1 372 720	R4 771 920
Mozambique	R488 351 456	R37 257 165	R9 783 421	R14 546 679	R880 634 767	R4 524 435	R28 496 518	R0	R1 066 810
Namibia	R160 818 424	R260 487 034	R18 389 965	R9 294 789	R22 208 649	R258 720	R43 548 317	R22 386 269	R4 209 190
Swaziland	R122 076 093	R6 675 556	R5 564 480	R119 822 570	R114 396 079	R9 363 200	R9 552 182	R1 762 243	R1 909 711
Zambia	R851 015 413	R32 245 787	R6 244 516	R48 477 949	R4 762 731	R1 425 412	R7 328 542	R1 095 850	R404 373
Zimbabwe	R3 983 940 892	R342 392 793	R107 274 535	R198 004 159	R70 510 723	R224 915 431	R63 423 381	R26 126 696	R42 131 322
Angola	R217 362 074	R40 565 620	R1 168 778	R5 206 145	R3 346 262	R829 200	R708 187	R0	R2 244 000
Democratic Republic of Congo	R176 781 936	R16 318 092	R5 553 120	R2 532 359	R0	R2 796 580	R0	R0	R504 228
Ethiopia	R15 811 855	R19 419 118	R1 124 280	R1 937 379	R551 540	R108 420	R293 157	R0	R56 714
Ghana	R115 243 346	R130 464 596	R2 719 395	R929 822	R2 536 021	R809 941	R1 007 279	R0	R183 079
Kenya	R135 335 064	R54 506 498	R9 474 803	R17 808 264	R2 523 250	R8 379 821	R2 461 742	R1 900 640	R221 143
Nigeria	R80 658 669	R47 721 285	R7 073 401	R8 154 561	R4 803 463	R434 263	R4 703 093	R0	R122 777
Tanzania	R185 385 107	R53 895 567	R1 792 221	R8 152 854	R861 877	R573 777	R483 386	R0	R2 614 763
Uganda	R76 141 089	R29 364 956	R1 199 400	R2 005 080	R1 524 457	R0	R82 195	R0	R777 000
Other Africa	R211 543 261	R68 072 143	R21 601 907	R13 992 633	R8 957 907	R1 450 075	R17 283 375	R0	R246 276
Asia	**R491 588 727**	**R248 419 010**	**R40 688 669**	**R100 543 030**	**R23 556 284**	**R23 737 781**	**R15 695 927**	**R9 194 630**	**R4 624 533**
China including Hong Kong	R98 894 616	R31 225 870	R11 242 939	R15 622 306	R3 774 410	R4 008 929	R963 033	R5 743 993	R2 883 613
India	R164 616 850	R62 813 778	R9 848 669	R55 500 789	R10 870 429	R2 763 388	R7 797 237	R0	R155 003
Japan	R43 995 153	R30 397 127	R1 788 456	R4 333 202	R4 213 317	R8 135 229	R260 645	R0	R710 850
Malaysia	R10 686 876	R25 329 381	R0	R3 439 302	R0	R1 455 000	R364 041	R0	R123 669
Singapore	R12 461 685	R26 046 819	R1 975 617	R749 000	R2 881 098	R0	R0	R0	R1 076 000
South Korea	R25 375 411	R15 021 844	R1 363 620	R4 229 833	R104 191	R1 960 000	R143 490	R2 803 659	R3 720 840
Other Asia	R135 558 138	R57 584 191	R14 469 367	R16 668 599	R1 712 839	R5 415 235	R6 167 481	R646 979	R875 067
Australasia	**R252 473 885**	**R358 255 387**	**R58 825 253**	**R68 568 504**	**R71 547 326**	**R35 126 731**	**R36 685 543**	**R803 881**	**R9 482 075**
Australia	R205 791 502	R310 473 535	R43 161 366	R50 445 849	R63 918 617	R32 297 849	R31 383 559	R603 679	R8 135 718
New Zealand	R46 682 383	R47 465 283	R15 663 887	R18 122 655	R7 628 709	R2 828 882	R5 301 984	R200 202	R1 346 357
Other Australasia	R0	R316 569	R0	R0	R0	R0	R0	R0	R0
South America	**R166 553 752**	**R217 147 708**	**R19 420 312**	**R12 644 315**	**R45 907 823**	**R37 237 489**	**R11 199 818**	**R0**	**R71 460**
Argentina	R17 409 587	R11 518 812	R162 982	R2 962 630	R2 615 775	R845 347	R257 117	R0	R616 550
Brazil	R100 767 769	R176 445 683	R12 194 762	R6 120 074	R34 520 609	R30 621 572	R7 703 290	R0	R71 460
Chile	R10 538 526	R12 380 766	R553 425	R950 540	R1 039 669	R802 566	R602 595	R0	R0
Other Central & South America	R37 837 870	R16 802 448	R6 509 142	R2 611 071	R7 731 770	R4 968 004	R2 636 816	R0	R2 254 209
Europe	**R2 946 315 139**	**R4 933 494 902**	**R561 482 531**	**R585 292 635**	**R799 718 585**	**R576 323 282**	**R210 211 475**	**R95 744 802**	**R66 730 568**
Austria	R49 472 075	R80 121 697	R6 129 288	R12 265 319	R18 705 044	R14 978 606	R1 599 117	R0	R1 906 390
Belgium	R93 369 143	R135 503 760	R17 304 346	R14 682 149	R21 835 619	R18 148 453	R7 398 780	R2 350 696	R1 182 112
Denmark	R42 717 563	R44 811 368	R5 451 845	R1 889 604	R7 391 501	R26 792 774	R367 055	R0	R452 766
Finland	R11 908 426	R33 657 264	R3 902 692	R1 374 914	R7 876 096	R2 896 022	R231 682	R0	R2 789 824
France	R215 805 554	R388 309 948	R40 801 005	R47 527 000	R109 319 977	R49 212 218	R13 347 711	R3 496 308	R4 087 408
Germany	R616 320 029	R1 154 614 279	R124 287 827	R138 062 700	R244 323 656	R154 845 509	R60 932 353	R26 555 255	R9 395 404
Ireland	R79 505 065	R91 722 940	R8 312 445	R18 867 901	R15 753 477	R16 855 258	R1 806 896	R0	R571 252
Italy	R72 890 341	R114 029 318	R17 130 912	R18 664 085	R15 097 423	R4 237 501	R974 500	R4 611 551	R6 931 779
Netherlands	R215 575 505	R414 480 298	R44 865 731	R30 931 418	R117 005 512	R92 329 610	R11 109 957	R6 771 520	R8 978 434
Norway	R23 489 111	R62 267 785	R4 236 349	R32 224 585	R7 964 368	R16 927 630	R304 854	R19 574 932	R1 868 381
Portugal	R30 767 343	R50 907 390	R4 361 370	R1 542 135	R3 298 980	R453 966	R1 827 499	R0	R125 210
Russian Fed	R265 794 766	R178 276 302	R5 475 463	R40 802 430	R10 571 505	R0	R0	R2 625 475	R856 350
Spain	R32 007 198	R83 717 181	R3 897 310	R10 476 455	R22 037 967	R14 000 250	R830 273	R801 770	R877 162
Sweden	R39 642 564	R109 188 910	R9 732 587	R13 601 422	R14 998 988	R13 449 492	R10 315 792	R379 592	R2 628 734
Switzerland	R77 544 151	R232 104 402	R19 200 383	R12 711 793	R50 410 347	R25 625 288	R10 864 134	R1 599 228	R14 404 685
Turkey	R59 006 417	R53 256 255	R1 557 229	R1 194 177	R4 293 260	R0	R568 721	R0	R11 065 271
UK	R903 883 018	R1 565 225 473	R232 011 103	R165 234 859	R102 592 691	R112 027 236	R74 826 344	R21 651 471	R27 069 239
Other Europe	R116 616 871	R141 300 332	R12 824 646	R23 239 691	R26 242 174	R13 543 466	R12 905 807	R5 327 004	R2 562 686
Middle East	**R133 586 406**	**R61 719 605**	**R12 086 814**	**R7 911 588**	**R2 758 126**	**R709 612**	**R6 966 282**	**R216 052**	**R1 575 960**
UAE	R7 735 674	R3 602 825	R2 193 774	R703 100	R0	R123 900	R0	R0	R917 117
Other Middle East	R125 850 733	R58 116 780	R9 893 039	R7 208 488	R2 758 126	R585 712	R6 966 282	R216 052	R1 575 960
North America	**R888 570 773**	**R789 800 953**	**R158 068 300**	**R170 396 043**	**R286 211 793**	**R477 436 283**	**R100 955 193**	**R224 373 478**	**R11 005 886**
Canada	R90 949 039	R214 682 991	R20 484 848	R33 238 074	R38 403 891	R19 135 122	R10 865 182	R3 692 575	R647 071
USA	R797 621 734	R575 117 962	R137 583 453	R137 157 968	R247 807 901	R458 301 161	R90 090 010	R220 680 903	R10 358 814
TOTAL	**R12 995 964 547**	**R7 925 359 326**	**R1 095 225 342**	**R1 514 624 817**	**R2 368 915 006**	**R1 454 486 707**	**R641 131 782**	**R396 083 490**	**R449 106 365**

APPENDIX

AVERAGE SPEND - PROVINCIAL DISTRIBUTION									
	Q4 2025								
	Gauteng	Western Cape	Eastern Cape	KwaZulu- Natal	Mpumalanga	Limpopo	North West	Northern Cape	Free State
Africa	**R9 100**	**R12 300**	**R7 100**	**R4 000**	**R2 000**	**R5 300**	**R3 300**	**R3 000**	**R2 000**
Botswana	R3 500	R10 600	R6 500	R4 500	R5 800	R1 900	R1 300	R800	R2 900
Lesotho	R3 000	R7 200	R2 600	R3 200	R2 100	R3 700	R1 200	R1 500	R1 800
Malawi	R19 700	R8 900	R89 500	R8 000	R400	R5 700	R17 000	R2 000	R21 000
Mozambique	R5 500	R6 000	R3 200	R7 500	R2 000	R2 600	R3 400	R0	R6 500
Namibia	R14 300	R9 400	R12 700	R5 700	R26 600	R1 500	R30 100	R3 500	R5 200
Swaziland	R2 300	R7 600	R2 000	R1 600	R1 000	R2 400	R6 400	R2 900	R1 500
Zambia	R22 700	R8 000	R8 100	R6 400	R6 800	R2 000	R6 000	R5 300	R1 900
Zimbabwe	R9 100	R13 000	R6 600	R8 300	R4 900	R8 400	R5 500	R4 300	R13 000
Angola	R34 500	R19 000	R14 800	R21 100	R27 600	R20 000	R9 400	R0	R60 000
Democratic Republic of Congo	R17 700	R18 100	R13 500	R5 000	R0	R11 600	R0	R0	R1 900
Ethiopia	R9 600	R25 700	R6 200	R8 200	R5 500	R3 000	R5 800	R0	R0
Ghana	R17 400	R45 500	R11 000	R3 800	R10 500	R2 100	R4 400	R0	R0
Kenya	R11 700	R15 500	R17 200	R10 900	R6 200	R15 200	R6 100	R14 000	R800
Nigeria	R17 400	R26 600	R16 400	R11 900	R15 500	R5 200	R20 000	R0	R4 300
Tanzania	R23 300	R24 000	R25 600	R21 200	R4 900	R4 100	R2 700	R0	R0
Uganda	R24 700	R26 900	R5 400	R6 700	R10 200	R0	R500	R0	R10 000
Other Africa	R18 700	R15 900	R16 600	R7 700	R13 200	R4 700	R47 500	R0	R24 800
Asia	**R19 600**	**R18 200**	**R13 900**	**R20 700**	**R9 700**	**R14 500**	**R8 800**	**R32 400**	**R22 700**
China including Hong Kong	R22 700	R16 000	R19 500	R23 700	R10 400	R18 200	R8 800	R47 100	R79 700
India	R22 600	R20 100	R12 200	R24 300	R12 600	R9 200	R10 400	R0	R3 400
Japan	R12 800	R25 300	R19 600	R9 700	R9 700	R39 500	R5 500	R0	R15 000
Malaysia	R13 400	R24 700	R0	R21 600	R0	R20 000	R3 700	R0	R0
Singapore	R9 200	R19 700	R18 400	R7 000	R5 700	R0	R0	R0	R0
South Korea	R12 200	R16 100	R10 000	R11 500	R2 300	R40 000	R3 000	R30 500	R0
Other Asia	R23 500	R14 000	R11 900	R20 100	R7 600	R6 800	R8 400	R9 200	R11 700
Australasia	**R13 100**	**R20 100**	**R14 800**	**R22 400**	**R11 200**	**R14 000**	**R19 600**	**R3 000**	**R13 200**
Australia	R13 000	R20 000	R13 800	R18 900	R11 500	R14 200	R20 500	R4 000	R12 200
New Zealand	R13 500	R20 400	R18 700	R46 200	R9 100	R12 200	R15 800	R1 700	R25 200
Other Australasia	R0	R7 700	R0	R0	R0	R0	R0	R0	R0
South America	**R11 600**	**R15 200**	**R9 100**	**R10 600**	**R8 200**	**R15 900**	**R4 700**	**R0**	**R300**
Argentina	R15 900	R14 700	R3 300	R24 800	R7 300	R11 800	R4 600	R0	R0
Brazil	R9 700	R14 600	R7 600	R9 500	R7 700	R18 200	R4 200	R0	R300
Chile	R15 200	R24 800	R11 200	R15 000	R10 700	R6 600	R8 300	R0	R0
Other Central & South America	R16 900	R18 300	R15 200	R7 100	R11 900	R10 500	R6 600	R0	R0
Europe	**R17 800**	**R20 300**	**R11 700**	**R14 100**	**R10 900**	**R17 900**	**R13 200**	**R21 600**	**R12 000**
Austria	R13 900	R17 000	R7 800	R11 100	R9 000	R11 900	R5 400	R0	R0
Belgium	R13 900	R16 900	R6 700	R8 300	R7 200	R14 500	R22 800	R9 800	R13 900
Denmark	R17 100	R15 300	R9 100	R5 700	R6 300	R30 300	R2 200	R0	R7 800
Finland	R20 300	R21 000	R14 700	R10 000	R13 000	R37 200	R2 900	R0	R0
France	R15 200	R18 500	R10 800	R9 400	R10 400	R17 000	R13 200	R12 900	R7 700
Germany	R17 500	R19 000	R9 600	R12 700	R11 600	R18 600	R15 700	R29 800	R10 900
Ireland	R22 200	R17 000	R11 000	R16 900	R10 700	R17 000	R5 400	R0	R4 400
Italy	R14 000	R15 400	R12 100	R25 300	R6 900	R14 500	R2 300	R26 800	R29 300
Netherlands	R16 500	R18 000	R8 800	R7 500	R13 700	R20 000	R8 200	R26 500	R13 200
Norway	R13 900	R20 100	R8 200	R104 900	R9 700	R64 800	R2 400	R342 900	R14 900
Portugal	R14 100	R21 200	R12 500	R6 300	R5 400	R3 900	R11 600	R0	R2 900
Russian Fed	R29 800	R28 800	R5 400	R32 400	R10 000	R0	R0	R6 100	R0
Spain	R14 200	R17 200	R5 200	R14 000	R10 200	R23 100	R2 900	R10 000	R4 000
Sweden	R12 200	R15 900	R6 900	R20 700	R10 800	R16 500	R18 500	R3 900	R16 900
Switzerland	R13 300	R22 900	R11 600	R9 000	R13 200	R17 000	R19 900	R9 600	R0
Turkey	R26 600	R27 400	R4 700	R4 200	R8 800	R0	R2 700	R0	R0
UK	R19 300	R23 700	R20 200	R17 100	R10 600	R16 700	R14 400	R14 400	R12 900
Other Europe	R14 500	R23 300	R6 300	R13 100	R10 400	R8 000	R13 200	R19 300	R6 900
Middle East	**R24 100**	**R22 600**	**R22 800**	**R16 600**	**R5 700**	**R3 800**	**R11 000**	**R1 200**	**R46 400**
UAE	R16 900	R10 800	R18 300	R6 100	R0	R5 000	R0	R0	R0
Other Middle East	R24 800	R24 200	R24 100	R19 900	R5 700	R3 600	R11 000	R1 200	R46 400
North America	**R18 200**	**R15 800**	**R19 000**	**R18 800**	**R14 200**	**R37 900**	**R16 500**	**R137 300**	**R8 300**
Canada	R11 700	R20 500	R9 200	R13 000	R9 800	R22 100	R13 200	R11 300	R7 100
USA	R19 500	R14 600	R22 600	R21 100	R15 200	R39 100	R17 000	R168 700	R8 400
TOTAL	**R11 100**	**R17 700**	**R10 900**	**R7 400**	**R3 500**	**R13 400**	**R6 000**	**R14 000**	**R2 500**

BEDNIGHTS, LENGTH OF STAY & ACCOMMODATION BEDNIGHTS

APPENDIX

BED NIGHTS BY COUNTRY				
	Q4 2023	Q4 2024	Q4 2025	% YOY GROWTH
AFRICA	**23 140 523**	**22 785 507**	**35 834 847**	**57.3%**
Botswana	546 396	395 217	576 595	45.9%
Lesotho	3 846 969	4 085 832	9 780 730	139.4%
Malawi	517 936	710 117	633 999	-10.7%
Mozambique	3 645 925	5 116 185	7 715 358	50.8%
Namibia	457 797	739 610	761 989	3.0%
eSwatini	2 116 542	2 390 191	3 015 548	26.2%
Zambia	504 476	548 388	694 147	26.6%
Zimbabwe	10 277 085	7 454 111	11 179 471	50.0%
Angola	104 103	145 811	93 140	-36.1%
DRC	210 044	195 719	195 682	0.0%
Ethiopia	23 762	32 800	29 749	-9.3%
Ghana	107 660	115 372	158 140	37.1%
Kenya	233 845	220 031	288 055	30.9%
Nigeria	82 183	115 649	135 703	17.3%
Tanzania	67 366	153 143	216 536	41.4%
Uganda	153 098	87 636	105 682	20.6%
Other Africa	245 336	279 696	254 323	-9.1%
ASIA	**877 157**	**751 929**	**649 444**	**-13.6%**
China including Hong Kong	156 128	138 110	88 354	-36.0%
India	368 636	244 978	243 161	-0.7%
Japan	69 568	66 654	71 646	7.5%
Malaysia	25 358	22 313	28 677	28.5%
Singapore	16 328	18 232	20 831	14.3%
South Korea	59 377	48 487	44 485	-8.3%
Other Asia	181 761	213 156	152 290	-28.6%
AUSTRALASIA	**458 864**	**528 071**	**537 344**	**1.8%**
Australia	363 423	429 786	436 324	1.5%
New Zealand	95 121	97 523	100 733	3.3%
Other Australia	320	763	287	-62.4%
CENTRAL & SOUTH AMERICA	**244 839**	**328 943**	**388 753**	**18.2%**
Argentina	23 098	29 376	20 147	-31.4%
Brazil	178 425	214 032	302 037	41.1%
Chile	8 125	10 626	11 645	9.6%
Other Central & South America	35 191	74 909	54 923	-26.7%
EUROPE	**4 925 369**	**5 191 873**	**5 821 098**	**12.1%**
Austria	93 602	105 210	131 863	25.3%
Belgium	193 394	217 255	217 802	0.3%
Denmark	76 257	82 522	80 259	-2.7%
Finland	27 821	23 140	22 088	-4.5%
France	429 411	494 534	481 688	-2.6%
Germany	1 179 045	1 201 897	1 418 513	18.0%
Ireland	114 013	125 302	152 316	21.6%
Italy	153 762	168 460	179 024	6.3%
The Netherlands	492 869	556 087	560 688	0.8%
Norway	52 925	48 658	56 928	17.0%
Portugal	49 247	50 000	64 691	29.4%
Russian Federation	112 415	136 789	183 628	34.2%
Spain	85 901	88 302	108 362	22.7%
Sweden	123 799	147 828	142 185	-3.8%
Switzerland	221 688	205 411	234 064	13.9%
Turkey	32 433	47 484	42 469	-10.6%
Uk	1 326 507	1 345 284	1 553 974	15.5%
Other Europe	160 280	147 711	190 556	29.0%
MIDDLE EAST	**176 835**	**110 741**	**196 676**	**77.6%**
United Arab Emirates	8 183	5 528	10 397	88.1%
Other Middle East	168 653	105 213	186 279	77.0%
NORTH AMERICA	**1 420 459**	**1 509 739**	**1 548 971**	**2.6%**
Canada	236 335	235 539	233 876	-0.7%
USA	1 184 123	1 274 200	1 315 095	3.2%
Other North America	0	0	0	-
TOTAL	**31 244 046**	**31 206 803**	**44 977 134**	**44.1%**

APPENDIX

AVERAGE LENGTH OF STAY BY COUNTRY				
	Q4 2023	Q4 2024	Q4 2025	% YOY GROWTH
AFRICA	**13.5**	**13.0**	**16.9**	**29.5%**
Botswana	4.7	3.4	4.7	39.6%
Lesotho	13.7	14.4	28.5	98.4%
Malawi	12.6	13.4	11.9	-10.9%
Mozambique	10.3	12.9	13.9	7.5%
Namibia	10.1	15.6	15.3	-1.6%
eSwatini	10.3	10.7	11.4	6.7%
Zambia	11.8	13.3	13.3	0.6%
Zimbabwe	18.3	14.6	18.9	29.4%
Angola	13.9	19.3	10.6	-44.7%
DRC	29.4	24.8	16.8	-32.0%
Ethiopia	12.7	17.9	10.1	-43.7%
Ghana	16.2	12.4	16.3	31.7%
Kenya	19.0	16.9	16.9	-0.2%
Nigeria	18.1	19.8	18.4	-6.9%
Tanzania	10.5	21.6	22.1	2.6%
Uganda	40.2	23.5	24.1	2.6%
Other Africa	15.2	16.7	14.0	-16.1%
ASIA	**20.5**	**17.5**	**14.8**	**-15.8%**
China including Hong Kong	19.3	15.1	12.6	-16.3%
India	22.5	16.9	19.2	13.9%
Japan	17.5	15.7	14.0	-10.3%
Malaysia	19.0	12.8	15.5	21.2%
Singapore	8.0	8.5	8.4	-0.4%
South Korea	21.6	18.4	13.7	-25.2%
Other Asia	22.4	25.2	13.0	-48.4%
AUSTRALASIA	**17.2**	**16.0**	**14.4**	**-10.3%**
Australia	16.9	15.9	14.1	-11.4%
New Zealand	18.7	16.9	16.2	-4.6%
Other Australia	6.5	16.2	7.0	-56.9%
CENTRAL & SOUTH AMERICA	**17.6**	**19.3**	**16.9**	**-12.7%**
Argentina	22.5	25.3	12.9	-49.0%
Brazil	18.0	16.9	17.5	3.6%
Chile	9.8	15.5	13.4	-13.5%
Other Central & South America	16.2	29.6	16.3	-45.0%
EUROPE	**14.0**	**14.4**	**13.4**	**-7.4%**
Austria	13.7	15.0	15.0	0.1%
Belgium	15.3	17.2	15.2	-11.6%
Denmark	15.1	16.3	13.9	-14.3%
Finland	12.7	10.7	9.2	-14.7%
France	13.9	15.6	13.0	-16.5%
Germany	15.3	14.9	13.9	-6.5%
Ireland	14.9	15.6	15.4	-1.1%
Italy	12.9	14.3	13.8	-3.5%
The Netherlands	14.0	15.8	14.2	-9.7%
Norway	12.9	16.9	11.8	-30.1%
Portugal	13.8	12.6	14.0	11.1%
Russian Federation	12.2	13.1	11.6	-11.2%
Spain	11.6	13.2	14.4	8.6%
Sweden	13.9	16.6	13.0	-22.0%
Switzerland	15.5	14.5	13.8	-5.0%
Turkey	10.6	13.4	10.0	-25.2%
Uk	13.2	13.1	12.7	-2.9%
Other Europe	14.0	12.3	12.1	-1.8%
MIDDLE EAST	**27.2**	**18.6**	**23.2**	**24.6%**
United Arab Emirates	16.7	12.0	12.9	7.7%
Other Middle East	28.1	19.2	24.3	26.6%
NORTH AMERICA	**14.3**	**14.7**	**14.5**	**-1.2%**
Canada	15.3	14.2	12.5	-12.5%
USA	14.1	14.7	14.9	1.2%
Other North America	0.0	0.0	0.0	-
TOTAL	**13.8**	**13.5**	**16.2**	**19.8%**

APPENDIX

	ACCOMMODATION TYPE - BED NIGHTS Q4 2025								
	Hotels	Guest House	BnB	Self-Catering	Game Lodge	Backpacker	Camping	Friends & Family	Air B&B
AFRICA	**1 280 368**	**396 545**	**203 519**	**676 824**	**74 910**	**109 640**	**3 488**	**30 544 033**	**94 548**
Botswana	56 898	21 558	12 738	12 707	5 095	1 070	0	270 092	457
Lesotho	26 652	20 720	25 220	351 871	2 817	105 268	704	8 804 604	1 266
Malawi	90 128	11 289	3 799	953	1 237	0	0	423 637	532
Mozambique	69 711	21 340	13 931	50 342	2 156	0	0	7 506 468	205
Namibia	146 428	44 609	30 445	54 499	2 296	1 897	263	333 817	2 993
eSwatini	39 253	38 353	3 109	608	7 924	608	0	2 823 911	5 218
Zambia	97 359	22 976	3 319	7 516	16 913	0	0	371 417	1 111
Zimbabwe	424 695	135 173	95 111	96 582	25 212	0	1 916	9 624 262	55 539
Angola	30 122	13 730	4 848	10 193	323	0	92	27 908	553
DRC	34 397	3 075	601	4 251	0	0	0	92 658	0
Ethiopia	7 439	570	0	0	793	0	0	19 443	0
Ghana	30 769	1 629	7 288	15 805	1 282	0	0	40 958	6 159
Kenya	81 854	7 215	1 561	26 667	2 413	512	512	29 106	14 759
Nigeria	24 522	4 264	0	28 467	955	0	0	40 168	5 113
Tanzania	43 970	22 334	0	3 628	2 252	0	0	30 526	553
Uganda	10 796	2 143	389	2 861	0	285	0	18 156	0
Other Africa	65 375	25 567	1 161	9 874	3 244	0	0	86 902	90
ASIA	**208 938**	**56 216**	**12 495**	**64 224**	**9 612**	**1 914**	**0**	**225 243**	**1 570**
China including Hong Kong	30 630	3 522	1 099	3 202	1 178	310	0	46 196	221
India	59 245	28 652	5 572	42 476	2 473	1 298	0	53 550	109
Japan	20 823	4 470	4 347	9 449	3 869	306	0	28 383	0
Malaysia	8 423	8 730	588	1 625	0	0	0	9 312	0
Singapore	10 902	3 780	0	2 076	1 335	0	0	1 498	1 240
South Korea	8 649	622	441	3 157	143	0	0	21 337	0
Other Asia	70 267	6 441	448	2 239	613	0	0	64 967	0
AUSTRALASIA	**91 675**	**31 404**	**12 369**	**26 428**	**43 606**	**3 925**	**3 453**	**296 328**	**10 011**
Australia	78 843	23 708	11 835	23 162	39 727	3 577	3 168	239 722	9 342
New Zealand	12 545	7 696	534	3 266	3 879	348	285	56 606	669
Other Australia	287	0	0	0	0	0	0	0	0
CENTRAL & SOUTH AMERICA	**138 327**	**6 656**	**7 829**	**29 426**	**30 267**	**28 243**	**33 796**	**66 896**	**7 642**
Argentina	9 043	1 563	308	2 058	1 160	824	0	4 396	526
Brazil	115 580	4 564	6 839	26 543	20 001	26 367	32 688	42 738	4 875
Chile	4 355	358	0	427	751	371	0	3 076	1 844
Other Central & South America	9 349	170	682	397	8 354	681	1 108	16 686	397
EUROPE	**1 702 208**	**517 516**	**187 519**	**591 015**	**597 398**	**69 257**	**134 077**	**1 704 715**	**97 637**
Austria	43 755	7 066	3 805	10 875	20 958	892	5 632	28 675	3 510
Belgium	58 522	17 599	7 621	12 684	20 062	3 403	2 088	77 791	1 020
Denmark	19 958	5 929	2 551	4 604	15 320	1 687	2 627	13 444	8 591
Finland	12 431	2 172	476	482	4 369	0	193	1 965	0
France	163 924	40 961	20 287	41 580	68 190	2 890	16 988	85 743	10 413
Germany	405 671	139 000	55 054	169 235	179 912	33 416	39 573	297 060	21 233
Ireland	34 053	4 153	4 126	7 248	7 033	561	2 565	78 868	3 048
Italy	60 420	17 794	10 170	26 114	13 220	0	2 959	37 015	1 196
The Netherlands	145 011	47 911	22 766	73 042	69 408	10 382	25 082	148 677	2 868
Norway	15 920	10 567	2 446	4 647	7 314	761	0	11 826	2 089
Portugal	18 878	7 001	532	10 840	1 728	84	0	25 413	214
Russian Federation	74 697	7 519	4 548	42 813	5 446	0	395	34 912	13 297
Spain	33 341	15 579	6 773	17 052	11 260	132	2 662	20 247	0
Sweden	43 529	31 872	4 429	24 257	18 597	292	546	17 177	1 486
Switzerland	79 918	16 808	8 010	14 774	29 366	963	14 208	61 020	4 810
Turkey	19 759	9 795	968	811	1 190	0	0	2 615	0
Uk	402 437	116 580	28 341	109 812	105 113	12 374	13 856	715 385	19 172
Other Europe	69 984	19 210	4 615	20 145	18 912	1 420	4 702	46 880	4 689
MIDDLE EAST	**24 052**	**6 975**	**1 273**	**22 526**	**2 501**	**229**	**0**	**108 424**	**1 716**
United Arab Emirates	2 204	149	0	297	0	99	0	5 382	50
Other Middle East	21 848	6 827	1 273	22 229	2 501	130	0	103 042	1 666
NORTH AMERICA	**420 932**	**66 640**	**34 023**	**126 080**	**210 277**	**12 908**	**13 580**	**549 421**	**20 992**
Canada	83 341	12 555	5 249	19 627	37 524	906	453	69 773	3 825
USA	337 591	54 085	28 774	106 453	172 753	12 002	13 127	479 648	17 167
Other North America	0	0	0	0	0	0	0	0	0
TOTAL	**3 866 500**	**1 081 953**	**459 027**	**1 536 523**	**968 570**	**226 115**	**188 394**	**33 495 059**	**234 115**

APPENDIX

	ACCOMMODATION BEDNIGHTS BY PROVINCE								
	Q4 2025								
	Gauteng	Western Cape	Eastern Cape	KwaZulu-Natal	Mpumalanga	Limpopo	North West	Northern Cape	Free State
Hotels	1 631 552	1 569 790	113 127	217 301	125 019	110 498	70 350	15 709	13 155
Guest house	302 491	498 068	56 535	48 052	88 065	31 718	32 033	6 555	18 437
Bed & Breakfast	124 147	186 887	19 286	36 063	43 242	15 844	16 244	3 682	13 632
Game Lodges	39 567	53 418	61 874	59 367	393 943	288 999	54 067	16 175	1 160
Self Catering Units	413 551	683 841	88 222	38 989	22 599	50 661	20 445	25 504	192 710
Friends/Family	15 804 961	1 935 361	787 639	1 900 129	7 943 623	697 522	1 121 768	476 965	2 827 090
Backpacker hostels	11 070	73 824	3 254	12 316	16 729	11 835	510	0	96 578
Camping/caravanning	15 087	12 091	702	10 193	53 683	80 662	8 351	6 493	1 133
Hospital	2 281	11 055	0	0	0	0	0	0	0
Train/Ship etc	2 924	4 613	2 694	3 444	69	0	0	0	138
AirBnB	65 163	113 185	22 333	25 148	4 935	2 249	757	0	346
Couch	0	871	22 409	0	0	153	0	0	0
Other	1 139 404	438 462	442 437	171 097	100 275	44 913	140 144	13 004	224 214

	ACCOMMODATION LENGTH OF STAY BY PROVINCE								
	Q4 2025								
	Gauteng	Western Cape	Eastern Cape	KwaZulu-Natal	Mpumalanga	Limpopo	North West	Northern Cape	Free State
Hotels	3.4	6.4	3.5	3.9	0.4	5.1	1.3	1.8	0.2
Guest house	1.6	6.7	3.7	1.8	0.3	2.0	0.6	0.9	0.3
Bed & Breakfast	0.7	4.2	2.1	1.6	0.2	1.1	0.3	0.6	0.2
Game Lodges	0.3	1.5	3.2	2.1	1.1	6.2	0.9	2.0	0.0
Self Catering Units	2.5	10.0	9.4	1.9	0.1	3.7	0.4	3.7	3.4
Friends/Family	20.2	16.0	17.9	14.5	13.3	16.1	14.0	21.9	16.3
Backpacker hostels	0.1	2.4	0.5	0.7	0.1	1.0	0.0	0.0	1.8
Camping/caravanning	0.1	0.5	0.1	0.6	0.2	5.3	0.2	0.9	0.0
Hospital	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Train/Ship etc	0.0	0.2	0.4	0.2	0.0	0.0	0.0	0.0	0.0
AirBnB	7.5	11.7	11.1	14.4	5.8	39.0	9.0	0.0	6.0
Couch	0.0	0.0	4.0	0.0	0.0	0.0	0.0	0.0	0.0
Other	17.1	57.9	88.7	12.0	14.1	3.9	14.3	32.2	28.8

PURPOSE OF VISIT

APPENDIX

PURPOSE OF VISIT (CATEGORIES) Q4 2025	Holiday	Shopping personal	Shopping business	Business traveller	MICE	Medical	VFR	Religion	Other
AFRICA	**10.6%**	**4.5%**	**5.5%**	**4.0%**	**3.6%**	**1.2%**	**63.4%**	**1.9%**	**5.3%**
Botswana	20.0%	2.7%	9.6%	22.1%	5.9%	0.6%	27.5%	6.3%	5.4%
Lesotho	1.5%	1.1%	1.4%	0.1%	1.1%	0.6%	84.1%	1.8%	8.3%
Malawi	6.7%	2.5%	40.6%	10.3%	6.1%	1.7%	24.4%	3.5%	4.2%
Mozambique	12.9%	6.4%	2.0%	0.7%	0.6%	1.4%	75.0%	0.4%	0.5%
Namibia	23.0%	0.5%	2.1%	8.1%	6.6%	2.0%	35.2%	1.7%	20.9%
Eswatini	13.4%	2.4%	4.2%	0.7%	1.0%	0.2%	72.5%	2.2%	3.4%
Zambia	9.9%	2.1%	23.9%	25.2%	8.2%	1.3%	18.7%	1.3%	9.5%
Zimbabwe	8.7%	7.4%	6.8%	2.7%	5.1%	1.4%	60.8%	2.3%	4.8%
Angola	17.0%	2.4%	0.5%	13.7%	13.7%	18.2%	12.0%	0.9%	21.5%
DRC	9.4%	0.0%	1.4%	15.7%	24.7%	7.0%	19.3%	0.8%	21.7%
Ethiopia	17.7%	0.0%	1.2%	29.6%	14.1%	3.4%	11.4%	0.0%	22.6%
Ghana	38.2%	0.0%	1.3%	10.0%	12.0%	1.2%	15.1%	2.5%	19.8%
Kenya	15.8%	0.0%	0.0%	10.3%	30.8%	0.0%	17.5%	3.9%	21.6%
Nigeria	19.2%	0.4%	0.7%	21.1%	19.3%	0.4%	18.4%	0.8%	19.9%
Tanzania	21.8%	0.0%	2.9%	5.7%	18.5%	2.5%	12.2%	0.0%	36.5%
Uganda	11.6%	0.0%	3.4%	16.6%	15.0%	3.2%	10.0%	1.8%	38.4%
Other Africa	16.9%	0.3%	4.8%	24.9%	19.3%	0.3%	15.8%	1.9%	15.8%
ASIA	**19.8%**	**0.0%**	**0.1%**	**21.4%**	**23.8%**	**0.4%**	**24.1%**	**0.1%**	**10.4%**
China including Hong Kong	12.8%	0.2%	0.5%	29.7%	23.9%	0.0%	29.4%	0.0%	3.4%
India	16.6%	0.0%	0.0%	26.5%	22.9%	0.6%	17.5%	0.0%	15.9%
Japan	17.3%	0.0%	0.0%	17.2%	30.2%	0.9%	24.4%	0.0%	9.9%
Malaysia	31.7%	0.0%	0.0%	29.6%	19.1%	0.0%	19.7%	0.0%	0.0%
Singapore	45.7%	0.0%	0.0%	3.9%	37.9%	0.0%	8.2%	0.0%	4.3%
South Korea	14.7%	0.0%	0.0%	8.4%	29.4%	1.4%	36.0%	0.0%	10.1%
Other Asia	22.5%	0.0%	0.0%	18.6%	18.1%	0.0%	28.6%	0.3%	11.8%
AUSTRALASIA	**38.5%**	**0.0%**	**0.2%**	**4.7%**	**6.0%**	**0.2%**	**46.8%**	**0.6%**	**3.1%**
Australia	41.1%	0.0%	0.3%	4.4%	6.3%	0.2%	44.4%	0.5%	2.9%
New Zealand	25.6%	0.0%	0.0%	6.2%	3.6%	0.0%	59.1%	0.9%	4.5%
Other Australia	0.0%	0.0%	0.0%	0.0%	100.0%	0.0%	0.0%	0.0%	0.0%
CENTRAL & SOUTH AMERICA	**57.6%**	**0.0%**	**0.0%**	**6.2%**	**10.5%**	**0.0%**	**7.5%**	**0.4%**	**17.9%**
Argentina	46.8%	0.0%	0.0%	5.0%	26.8%	0.0%	8.5%	1.9%	11.0%
Brazil	63.0%	0.0%	0.0%	5.9%	6.4%	0.0%	6.0%	0.0%	18.8%
Chile	49.1%	0.0%	0.0%	7.6%	20.6%	0.0%	14.4%	0.0%	8.3%
Other Central & South America	37.1%	0.0%	0.0%	8.5%	21.2%	0.0%	12.7%	1.5%	19.0%
EUROPE	**48.9%**	**0.1%**	**0.0%**	**13.1%**	**10.1%**	**0.1%**	**23.4%**	**0.2%**	**4.2%**
Austria	61.5%	0.0%	0.0%	14.0%	12.1%	0.0%	6.6%	0.0%	5.9%
Belgium	51.5%	0.0%	0.0%	9.2%	15.8%	0.0%	19.5%	0.0%	4.0%
Denmark	59.3%	0.0%	0.0%	11.3%	12.4%	0.0%	12.3%	0.0%	4.6%
Finland	68.0%	0.0%	0.0%	10.2%	15.4%	0.0%	6.5%	0.0%	0.0%
France	60.2%	0.0%	0.0%	11.0%	10.4%	0.0%	13.6%	0.2%	4.7%
Germany	56.2%	0.0%	0.0%	12.2%	10.7%	0.0%	16.6%	0.1%	4.3%
Ireland	41.3%	0.0%	0.0%	8.0%	5.4%	0.0%	41.9%	0.0%	3.5%
Italy	46.4%	0.5%	0.0%	20.0%	15.9%	0.4%	11.9%	0.4%	4.6%
The Netherlands	54.7%	0.0%	0.0%	9.9%	7.1%	0.0%	23.7%	0.2%	4.5%
Norway	55.8%	0.0%	0.0%	15.0%	10.4%	0.0%	13.2%	0.0%	5.6%
Portugal	34.1%	0.0%	0.0%	15.0%	15.4%	0.0%	30.2%	0.0%	5.3%
Russian Federation	37.5%	0.0%	0.0%	26.5%	17.2%	0.0%	16.1%	0.0%	2.7%
Spain	59.6%	0.0%	0.0%	9.1%	9.6%	0.0%	14.2%	0.0%	7.5%
Sweden	52.0%	0.0%	0.0%	9.8%	13.1%	0.0%	13.8%	1.1%	10.2%
Switzerland	56.5%	0.0%	0.0%	15.9%	10.5%	0.5%	14.5%	0.0%	2.1%
Turkey	28.5%	0.0%	0.0%	43.7%	19.2%	0.0%	5.6%	0.0%	2.9%
Uk	37.8%	0.1%	0.1%	11.1%	7.3%	0.2%	39.5%	0.4%	3.5%
Other Europe	41.5%	0.0%	0.0%	26.7%	10.2%	0.0%	16.1%	1.0%	4.5%
MIDDLE EAST	**22.3%**	**0.0%**	**0.0%**	**11.2%**	**12.9%**	**0.0%**	**45.9%**	**0.7%**	**7.0%**
United Arab Emirates	15.2%	0.0%	0.0%	23.1%	11.3%	0.0%	50.4%	0.0%	0.0%
Other Middle East	23.0%	0.0%	0.0%	9.9%	13.1%	0.0%	45.5%	0.7%	7.7%
NORTH AMERICA	**52.5%**	**0.0%**	**0.1%**	**11.4%**	**7.8%**	**0.3%**	**22.0%**	**1.4%**	**4.5%**
Canada	57.3%	0.0%	0.0%	6.1%	7.6%	0.4%	24.1%	0.4%	4.1%
USA	51.4%	0.0%	0.1%	12.6%	7.9%	0.3%	21.6%	1.6%	4.6%
Other North America	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
TOTAL	**19.2%**	**3.5%**	**4.2%**	**6.1%**	**5.2%**	**1.0%**	**54.1%**	**1.6%**	**5.3%**

REPEAT RATE

APPENDIX

REPEAT VISITS BY COUNTRY					
Q4 2025					
	First timers	2 - 3 times	4 - 5 times	6 - 9 times	10 times or more
Africa	**8.0%**	**13.4%**	**9.6%**	**10.7%**	**33.7%**
Botswana	8.1%	6.3%	5.6%	6.2%	37.8%
Lesotho	0.7%	2.6%	3.0%	1.6%	45.6%
Malawi	8.8%	11.4%	11.8%	10.0%	51.4%
Mozambique	12.4%	16.1%	8.6%	8.9%	7.3%
Namibia	4.4%	13.0%	9.6%	13.9%	59.0%
Swaziland	1.8%	15.1%	11.4%	15.9%	40.9%
Zambia	14.4%	14.6%	10.0%	12.3%	41.8%
Zimbabwe	7.2%	17.6%	13.7%	15.5%	44.1%
Angola	17.9%	11.5%	10.6%	16.5%	43.6%
Democratic Republic of Congo	24.0%	13.6%	16.7%	17.7%	27.9%
Ethiopia	39.2%	13.8%	18.0%	16.7%	12.3%
Ghana	51.7%	19.7%	9.9%	10.8%	7.9%
Kenya	36.4%	23.1%	14.5%	12.7%	13.3%
Nigeria	44.3%	16.1%	13.1%	16.6%	10.0%
Tanzania	31.1%	20.2%	14.7%	11.6%	22.4%
Uganda	44.1%	19.0%	12.3%	14.1%	10.5%
Other Africa	33.1%	22.1%	16.6%	16.7%	11.5%
Asia	**42.8%**	**23.4%**	**14.5%**	**11.4%**	**8.0%**
China including Hong Kong	30.6%	20.7%	15.9%	20.7%	12.1%
India	46.0%	26.3%	15.6%	7.1%	4.9%
Japan	37.6%	25.0%	18.7%	11.6%	7.1%
Malaysia	56.8%	13.1%	16.3%	3.4%	10.5%
Singapore	44.1%	26.4%	13.5%	11.5%	4.5%
South Korea	38.2%	24.4%	13.2%	13.1%	11.1%
Other Asia	49.4%	21.4%	10.1%	10.4%	8.7%
Australasia	**41.5%**	**21.9%**	**14.0%**	**12.8%**	**9.8%**
Australia	42.4%	21.7%	13.6%	12.3%	9.9%
New Zealand	36.6%	22.9%	15.8%	15.3%	9.4%
Other Australasia	16.1%	11.7%	70.6%	0.0%	1.7%
South America	**75.3%**	**12.4%**	**5.7%**	**3.1%**	**3.4%**
Argentina	61.8%	21.2%	10.2%	3.6%	3.2%
Brazil	77.5%	10.9%	5.1%	3.2%	3.2%
Chile	78.4%	6.9%	8.0%	3.8%	2.9%
Other Central & South America	71.5%	17.0%	5.2%	1.9%	4.4%
Europe	**47.5%**	**23.6%**	**11.8%**	**9.0%**	**8.0%**
Austria	55.2%	24.3%	9.2%	6.1%	5.2%
Belgium	53.8%	25.2%	9.6%	4.9%	6.5%
Denmark	54.6%	26.5%	9.6%	4.9%	4.3%
Finland	59.8%	21.3%	10.1%	5.7%	3.1%
France	57.1%	21.9%	10.5%	5.7%	4.8%
Germany	50.7%	23.4%	11.7%	7.9%	6.2%
Ireland	40.2%	26.4%	11.9%	8.3%	13.2%
Italy	57.8%	23.3%	8.6%	6.9%	3.5%
Netherlands	48.0%	25.7%	10.7%	8.3%	7.3%
Norway	54.9%	21.9%	12.2%	4.3%	6.6%
Portugal	42.0%	21.5%	10.8%	12.3%	13.4%
Russian Fed	43.4%	23.7%	21.5%	7.6%	3.7%
Spain	54.1%	26.5%	8.8%	6.7%	3.8%
Sweden	55.3%	21.9%	10.8%	6.2%	5.7%
Switzerland	51.3%	25.0%	9.4%	7.4%	6.8%
Turkey	37.2%	36.6%	18.2%	4.8%	3.3%
UK	38.7%	22.2%	12.9%	13.5%	12.7%
Other Europe	50.6%	25.1%	12.8%	6.2%	5.4%
Middle East	**38.2%**	**15.6%**	**15.5%**	**14.6%**	**16.1%**
UAE	33.6%	16.8%	17.7%	11.1%	20.7%
Other Middle East	39.4%	15.2%	14.9%	15.6%	14.8%
North America	**55.2%**	**19.9%**	**10.8%**	**8.0%**	**6.1%**
Canada	59.8%	21.2%	7.6%	5.7%	5.8%
USA	54.4%	19.6%	11.4%	8.4%	6.2%
Other North America	25.0%	25.0%	25.0%	0.0%	25.0%
TOTAL	**16.8%**	**15.3%**	**10.1%**	**10.3%**	**28.1%**

AGE CATEGORIES

APPENDIX

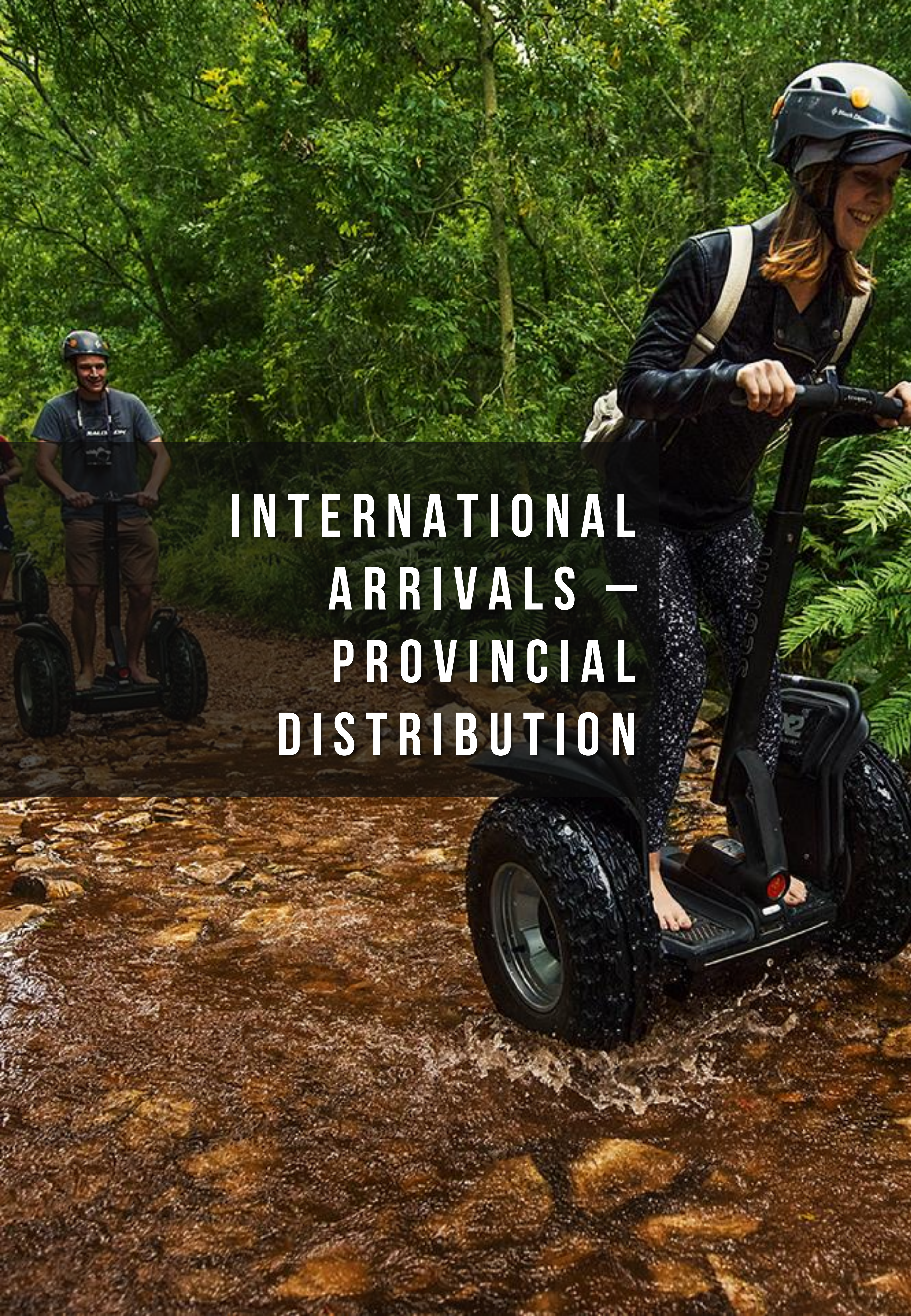
AGE CATEGORIES							
Q4 2025							
	18 - 24 years	25 - 30 years	31 - 34 years	35 - 40 years	41 - 50 years	51 - 60 years	60+ years
AFRICA	**18.0%**	**21.0%**	**16.7%**	**17.7%**	**18.8%**	**5.5%**	**2.3%**
Botswana	6.3%	14.3%	17.5%	22.2%	25.3%	8.0%	6.4%
Lesotho	24.9%	24.9%	16.8%	15.6%	13.7%	3.3%	1.0%
Malawi	5.7%	5.3%	16.1%	26.4%	32.7%	11.8%	2.1%
Mozambique	28.3%	29.5%	14.3%	13.2%	12.3%	2.1%	0.2%
Namibia	14.7%	14.3%	15.3%	16.1%	20.1%	8.8%	10.8%
eSwatini	28.7%	22.0%	21.0%	12.9%	12.9%	2.4%	0.0%
Zambia	5.4%	16.7%	14.4%	18.5%	35.6%	5.0%	4.4%
Zimbabwe	6.1%	14.8%	16.2%	22.8%	25.6%	10.0%	4.4%
Angola	3.3%	8.6%	25.3%	35.2%	20.6%	4.6%	2.5%
DRC	9.4%	10.8%	16.4%	28.3%	23.7%	6.4%	4.9%
Ethiopia	1.2%	16.6%	24.5%	29.4%	22.0%	4.6%	1.7%
Ghana	5.1%	22.2%	33.2%	17.4%	16.0%	3.7%	2.5%
Kenya	8.7%	16.0%	22.8%	20.7%	23.0%	5.6%	3.2%
Nigeria	7.0%	18.9%	21.0%	22.8%	23.6%	5.9%	0.8%
Tanzania	9.0%	16.4%	23.1%	21.1%	24.7%	4.3%	1.4%
Uganda	10.0%	20.0%	33.7%	11.6%	19.6%	5.0%	0.0%
Other Africa	5.3%	14.7%	21.8%	24.5%	26.8%	5.4%	1.6%
ASIA	**4.2%**	**13.3%**	**24.1%**	**24.4%**	**26.1%**	**5.7%**	**2.2%**
China including Hong Kong	4.2%	15.7%	24.7%	24.6%	24.5%	5.7%	0.6%
India	4.9%	15.8%	22.5%	26.0%	23.4%	6.0%	1.4%
Japan	11.3%	12.0%	18.9%	27.0%	18.5%	5.8%	6.5%
Malaysia	0.0%	3.9%	19.1%	34.9%	42.1%	0.0%	0.0%
Singapore	0.0%	4.3%	12.5%	25.0%	45.6%	8.6%	3.9%
South Korea	8.7%	12.9%	31.9%	20.3%	18.9%	5.7%	1.5%
Other Asia	0.8%	13.1%	28.8%	20.7%	28.5%	5.7%	2.4%
AUSTRALASIA	**5.7%**	**9.9%**	**14.4%**	**15.5%**	**27.3%**	**14.7%**	**12.7%**
Australia	6.5%	10.5%	14.9%	16.4%	26.0%	12.6%	13.1%
New Zealand	1.9%	6.3%	11.5%	10.8%	33.9%	25.0%	10.7%
Other Australia	0.0%	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%
CENTRAL & SOUTH AMERICA	**5.3%**	**17.8%**	**27.3%**	**21.1%**	**19.4%**	**4.5%**	**4.6%**
Argentina	1.9%	15.9%	25.1%	25.1%	19.6%	9.0%	3.4%
Brazil	6.0%	18.2%	29.6%	21.0%	16.6%	3.1%	5.5%
Chile	0.0%	26.8%	25.7%	20.6%	19.5%	7.4%	0.0%
Other Central & South America	4.7%	14.0%	17.0%	20.1%	33.4%	9.1%	1.7%
EUROPE	**5.8%**	**12.4%**	**16.9%**	**18.6%**	**28.7%**	**10.0%**	**7.5%**
Austria	7.1%	10.9%	28.1%	11.3%	23.2%	16.0%	3.3%
Belgium	6.2%	12.1%	14.3%	13.0%	33.2%	12.2%	8.9%
Denmark	3.7%	16.1%	13.4%	12.3%	31.4%	14.5%	8.6%
Finland	4.0%	13.7%	13.9%	15.4%	34.0%	10.2%	8.9%
France	5.5%	9.3%	17.4%	18.6%	29.4%	9.1%	10.8%
Germany	6.1%	12.2%	15.9%	18.6%	30.0%	8.8%	8.3%
Ireland	8.6%	18.2%	16.3%	16.3%	26.9%	8.1%	5.6%
Italy	4.9%	13.9%	20.7%	15.9%	29.8%	10.1%	4.8%
The Netherlands	5.6%	13.4%	14.6%	18.9%	31.2%	9.9%	6.5%
Norway	16.2%	2.8%	18.8%	12.0%	25.2%	15.8%	9.2%
Portugal	4.1%	16.3%	16.4%	24.6%	26.4%	9.1%	3.2%
Russian Federation	0.0%	19.8%	31.9%	29.5%	14.8%	2.6%	1.4%
Spain	6.4%	17.3%	20.2%	19.1%	21.4%	7.8%	7.8%
Sweden	6.9%	8.6%	13.5%	18.0%	33.2%	15.0%	4.9%
Switzerland	5.2%	12.9%	13.6%	15.5%	33.7%	11.6%	7.5%
Turkey	5.6%	13.3%	27.7%	17.0%	33.4%	2.9%	0.0%
Uk	5.6%	12.2%	15.8%	19.9%	26.5%	11.2%	8.8%
Other Europe	7.2%	9.8%	19.0%	17.3%	35.7%	8.7%	2.3%
MIDDLE EAST	**8.0%**	**23.3%**	**22.0%**	**15.8%**	**18.6%**	**9.0%**	**3.3%**
United Arab Emirates	12.3%	8.2%	46.2%	14.2%	19.1%	0.0%	0.0%
Other Middle East	7.5%	24.9%	19.5%	16.0%	18.5%	9.9%	3.7%
NORTH AMERICA	**6.0%**	**9.6%**	**16.1%**	**17.2%**	**27.8%**	**10.8%**	**12.4%**
Canada	5.7%	7.6%	12.0%	16.5%	34.2%	10.0%	14.0%
USA	6.1%	10.0%	17.0%	17.4%	26.4%	11.0%	12.1%
Other North America	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
TOTAL	**15.1%**	**18.9%**	**16.9%**	**18.0%**	**20.9%**	**6.5%**	**3.7%**

ACTIVITIES

APPENDIX

ACTIVITIES UNDERTAKEN																		
Q4 2025																		
	Shopping	Nightlife	Theme parks	Trading	Visited a Casino	Adventure	Sporting - compete d	Sporting - spectator	Business	Education training study	Cultural, historical and heritage	Wildlife	Hunting	Visiting natural attractions	Beach	Social	Medical	Health
AFRICA	**74.3%**	**61.5%**	**35.7%**	**96.2%**	**79.5%**	**15.1%**	**74.1%**	**78.7%**	**36.7%**	**76.0%**	**13.8%**	**9.1%**	**21.8%**	**13.7%**	**30.5%**	**72.8%**	**89.7%**	**34.4%**
Botswana	3.4%	5.7%	0.4%	1.9%	0.3%	0.8%	3.5%	3.0%	1.6%	2.7%	0.3%	0.2%	0.0%	0.5%	0.7%	1.2%	2.1%	0.0%
Lesotho	10.0%	24.7%	11.3%	0.0%	23.2%	0.5%	33.2%	32.6%	1.9%	21.1%	1.8%	0.6%	11.0%	2.1%	4.5%	2.1%	24.9%	11.6%
Malawi	1.9%	0.4%	0.3%	25.6%	0.8%	0.2%	2.9%	0.4%	1.4%	1.8%	0.4%	0.1%	0.0%	0.4%	0.9%	1.9%	2.3%	0.7%
Mozambique	25.4%	0.7%	0.7%	7.8%	0.4%	0.2%	3.2%	2.7%	1.8%	2.4%	0.2%	0.0%	0.0%	0.4%	0.8%	33.0%	22.6%	0.4%
Namibia	1.8%	2.2%	3.0%	0.4%	1.7%	1.9%	1.7%	4.4%	1.4%	7.2%	2.1%	0.4%	0.0%	1.4%	5.0%	1.3%	2.5%	1.1%
Eswatini	6.0%	2.5%	0.2%	1.1%	0.0%	4.3%	13.2%	4.6%	0.8%	1.6%	0.0%	0.8%	9.5%	0.7%	4.0%	0.2%	1.4%	0.9%
Zambia	1.9%	1.5%	0.4%	14.7%	0.9%	0.4%	1.3%	2.5%	2.8%	3.8%	0.3%	0.4%	0.0%	0.4%	1.0%	1.4%	0.4%	0.4%
Zimbabwe	20.4%	19.3%	15.1%	42.1%	49.8%	3.4%	9.6%	26.0%	13.8%	17.0%	3.4%	4.5%	0.0%	3.8%	9.8%	28.5%	25.8%	8.4%
Angola	0.4%	0.7%	0.3%	0.1%	0.0%	0.4%	0.6%	0.1%	0.6%	1.7%	0.5%	0.2%	1.4%	0.5%	0.4%	0.6%	3.9%	0.5%
DRC	0.4%	0.4%	0.7%	0.3%	0.7%	0.2%	0.0%	0.2%	1.8%	2.4%	0.5%	0.1%	0.0%	0.2%	0.1%	0.3%	1.9%	1.3%
Ethiopia	0.1%	0.1%	0.1%	0.1%	0.0%	0.1%	0.2%	0.2%	0.4%	0.7%	0.1%	0.1%	0.0%	0.1%	0.1%	0.1%	0.2%	0.5%
Ghana	0.4%	1.2%	0.9%	0.2%	0.5%	0.8%	0.0%	0.0%	0.9%	1.8%	0.9%	0.3%	0.0%	0.6%	0.7%	0.3%	0.3%	0.7%
Kenya	0.7%	0.3%	0.6%	0.0%	0.6%	0.6%	2.5%	0.8%	2.8%	3.3%	0.8%	0.4%	0.0%	0.8%	0.7%	0.7%	0.3%	3.0%
Nigeria	0.3%	0.6%	0.2%	0.0%	0.1%	0.3%	0.0%	0.0%	0.9%	1.4%	0.5%	0.2%	0.0%	0.4%	0.4%	0.3%	0.1%	0.8%
Tanzania	0.4%	0.4%	0.1%	0.5%	0.0%	0.2%	0.9%	0.2%	0.9%	3.1%	0.6%	0.1%	0.0%	0.4%	0.4%	0.4%	0.6%	1.6%
Uganda	0.2%	0.2%	0.4%	0.3%	0.0%	0.2%	0.0%	0.2%	0.4%	1.3%	0.3%	0.1%	0.0%	0.2%	0.2%	0.1%	0.3%	0.0%
Other Africa	0.7%	0.4%	1.1%	1.2%	0.6%	0.8%	1.2%	0.7%	2.5%	2.8%	1.3%	0.8%	0.0%	0.8%	0.7%	0.5%	0.2%	2.4%
ASIA	**1.7%**	**2.2%**	**3.7%**	**0.2%**	**1.6%**	**2.4%**	**1.9%**	**1.4%**	**8.2%**	**3.9%**	**3.4%**	**2.5%**	**4.7%**	**3.7%**	**2.9%**	**1.9%**	**0.8%**	**3.1%**
China including Hong Kong	0.3%	0.4%	0.5%	0.1%	0.1%	0.3%	0.2%	0.2%	1.6%	0.2%	0.4%	0.3%	0.2%	0.4%	0.4%	0.3%	0.1%	0.6%
India	0.5%	0.4%	1.1%	0.0%	1.1%	0.6%	0.5%	0.3%	2.5%	1.9%	0.8%	0.8%	4.5%	1.0%	0.8%	0.5%	0.3%	0.9%
Japan	0.2%	0.2%	0.5%	0.0%	0.0%	0.2%	0.2%	0.0%	1.1%	0.5%	0.2%	0.2%	0.0%	0.3%	0.3%	0.3%	0.3%	0.0%
Malaysia	0.1%	0.2%	0.1%	0.0%	0.0%	0.2%	0.4%	0.2%	0.3%	0.1%	0.2%	0.1%	0.0%	0.3%	0.1%	0.1%	0.0%	0.3%
Singapore	0.1%	0.2%	0.2%	0.0%	0.0%	0.4%	0.0%	0.0%	0.5%	0.0%	0.3%	0.3%	0.0%	0.3%	0.3%	0.2%	0.0%	0.0%
South Korea	0.1%	0.1%	0.3%	0.1%	0.0%	0.1%	0.2%	0.1%	0.5%	0.3%	0.3%	0.1%	0.0%	0.2%	0.2%	0.2%	0.2%	0.5%
Other Asia	0.5%	0.7%	1.0%	0.0%	0.4%	0.6%	0.5%	0.7%	1.8%	0.9%	1.1%	0.6%	0.0%	1.1%	0.9%	0.5%	0.0%	0.7%
AUSTRALASIA	**1.5%**	**1.3%**	**3.7%**	**0.2%**	**1.3%**	**3.3%**	**2.2%**	**1.0%**	**1.5%**	**0.6%**	**3.8%**	**4.8%**	**2.2%**	**4.6%**	**3.7%**	**2.0%**	**0.2%**	**5.9%**
Australia	1.2%	0.9%	3.3%	0.2%	1.3%	2.8%	1.2%	0.5%	1.4%	0.5%	3.1%	4.2%	1.4%	3.9%	3.2%	1.6%	0.2%	5.0%
New Zealand	0.3%	0.4%	0.4%	0.0%	0.0%	0.5%	0.8%	0.5%	0.1%	0.1%	0.7%	0.7%	0.8%	0.7%	0.5%	0.4%	0.0%	0.9%
Other Australia	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
CENTRAL & SOUTH AMERICA	**1.0%**	**1.6%**	**2.8%**	**0.1%**	**0.6%**	**2.5%**	**1.0%**	**0.1%**	**1.6%**	**3.2%**	**4.4%**	**4.4%**	**0.0%**	**3.8%**	**2.8%**	**1.1%**	**1.4%**	**3.4%**
Argentina	0.1%	0.0%	0.1%	0.1%	0.1%	0.1%	0.0%	0.0%	0.2%	0.1%	0.3%	0.2%	0.0%	0.2%	0.1%	0.1%	0.0%	0.0%
Brazil	0.8%	1.5%	2.4%	0.0%	0.0%	2.2%	0.7%	0.0%	0.8%	2.9%	3.7%	3.3%	0.0%	3.1%	2.4%	0.9%	1.2%	3.4%
Chile	0.0%	0.0%	0.1%	0.0%	0.1%	0.1%	0.0%	0.1%	0.1%	0.1%	0.1%	0.1%	0.0%	0.1%	0.1%	0.0%	0.0%	0.0%
Other Central & South America	0.1%	0.1%	0.2%	0.0%	0.4%	0.2%	0.4%	0.0%	0.4%	0.2%	0.3%	0.7%	0.0%	0.3%	0.1%	0.1%	0.2%	0.0%
EUROPE	**16.9%**	**27.8%**	**43.9%**	**2.5%**	**12.9%**	**64.2%**	**17.7%**	**15.3%**	**42.2%**	**12.9%**	**60.6%**	**63.3%**	**19.5%**	**60.2%**	**50.1%**	**17.8%**	**6.4%**	**39.3%**
Austria	0.3%	0.8%	0.6%	0.0%	0.5%	1.4%	0.8%	0.3%	1.0%	0.5%	1.5%	1.8%	1.7%	1.5%	1.0%	0.3%	0.5%	1.6%
Belgium	0.6%	0.6%	1.8%	0.0%	0.7%	2.2%	0.3%	0.5%	1.6%	0.3%	2.2%	2.1%	0.0%	2.0%	1.6%	0.5%	0.2%	1.8%
Denmark	0.2%	0.3%	0.2%	0.2%	0.0%	0.8%	0.4%	0.2%	0.6%	0.1%	0.8%	1.1%	0.8%	0.8%	0.6%	0.2%	0.0%	0.6%
Finland	0.1%	0.3%	0.4%	0.0%	0.0%	0.4%	0.2%	0.0%	0.3%	0.0%	0.3%	0.5%	0.0%	0.4%	0.3%	0.1%	0.0%	0.0%
France	1.4%	2.1%	3.2%	0.2%	0.4%	5.9%	1.7%	1.2%	3.3%	1.1%	6.1%	6.3%	1.4%	5.4%	4.5%	1.3%	0.0%	1.0%
Germany	3.8%	6.3%	13.8%	0.5%	2.9%	15.8%	2.8%	3.5%	10.2%	3.8%	13.9%	16.2%	1.5%	15.3%	12.1%	3.9%	0.4%	7.2%
Ireland	0.4%	0.9%	0.8%	0.0%	1.1%	1.6%	0.0%	0.3%	0.6%	0.0%	1.4%	1.5%	0.0%	1.4%	1.3%	0.5%	0.9%	2.8%
Italy	0.5%	0.7%	1.2%	0.0%	0.5%	1.9%	0.9%	0.2%	2.0%	0.5%	1.9%	1.6%	0.0%	1.7%	1.4%	0.4%	0.3%	1.0%
The Netherlands	1.6%	2.0%	3.1%	0.2%	0.4%	6.6%	1.9%	1.3%	3.0%	1.1%	5.4%	6.7%	2.6%	5.5%	4.8%	1.5%	0.6%	2.8%
Norway	0.2%	0.3%	0.5%	0.0%	0.2%	0.9%	0.2%	0.0%	0.6%	0.1%	0.9%	0.8%	2.8%	0.7%	0.7%	0.2%	0.0%	0.8%
Portugal	0.2%	0.4%	0.4%	0.0%	0.1%	0.5%	0.2%	0.0%	0.6%	0.2%	0.5%	0.5%	0.0%	0.5%	0.4%	0.2%	0.1%	0.4%
Russian Federation	0.6%	1.0%	1.6%	0.0%	1.8%	1.5%	0.8%	0.6%	3.1%	0.6%	1.7%	1.7%	3.1%	2.0%	1.7%	0.4%	0.5%	1.3%
Spain	0.3%	0.6%	1.7%	0.1%	0.3%	1.3%	0.8%	0.7%	0.6%	0.4%	1.6%	1.2%	0.0%	1.2%	0.9%	0.3%	0.0%	0.8%
Sweden	0.4%	0.8%	1.0%	0.3%	0.7%	1.9%	0.7%	0.4%	1.0%	0.6%	1.8%	1.6%	0.9%	1.7%	1.3%	0.4%	0.4%	0.4%
Switzerland	0.6%	1.1%	2.0%	0.2%	0.3%	2.8%	0.0%	0.8%	1.4%	0.3%	2.8%	2.8%	0.0%	2.8%	2.2%	0.6%	0.2%	1.5%
Turkey	0.2%	0.2%	0.1%	0.0%	0.0%	0.4%	0.3%	0.2%	1.2%	0.1%	0.3%	0.4%	0.0%	0.4%	0.4%	0.1%	0.3%	0.7%
Uk	5.0%	8.7%	10.8%	0.9%	2.2%	16.3%	4.9%	4.6%	9.0%	2.2%	15.0%	14.2%	4.7%	14.8%	13.8%	6.1%	1.6%	13.6%
Other Europe	0.6%	0.7%	0.6%	0.0%	0.6%	2.0%	0.7%	0.4%	2.2%	0.7%	2.4%	2.6%	0.0%	2.0%	1.4%	0.6%	0.4%	1.1%
MIDDLE EAST	**0.4%**	**0.2%**	**1.2%**	**0.0%**	**0.0%**	**0.5%**	**0.0%**	**0.3%**	**1.0%**	**0.4%**	**0.7%**	**0.6%**	**0.0%**	**0.8%**	**0.5%**	**0.5%**	**0.4%**	**0.9%**
United Arab Emirates	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%	0.0%	0.0%	0.0%
Other Middle East	0.3%	0.2%	1.1%	0.0%	0.0%	0.4%	0.0%	0.3%	0.9%	0.3%	0.6%	0.5%	0.0%	0.7%	0.4%	0.4%	0.4%	0.9%
NORTH AMERICA	**4.1%**	**5.4%**	**9.1%**	**0.9%**	**4.1%**	**11.9%**	**3.0%**	**3.1%**	**8.7%**	**3.0%**	**13.3%**	**15.2%**	**51.7%**	**13.2%**	**9.5%**	**4.1%**	**1.1%**	**12.9%**
Canada	0.7%	1.1%	1.6%	0.3%	0.3%	2.8%	0.3%	0.5%	1.1%	0.3%	2.4%	3.1%	0.0%	2.7%	2.0%	0.8%	0.0%	1.9%
USA	3.4%	4.3%	7.4%	0.5%	3.8%	9.2%	2.7%	2.6%	7.6%	2.6%	11.0%	12.1%	51.7%	10.5%	7.5%	3.3%	1.1%	11.0%
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0 %**	**100.0%**	**100.0 %**

INTERNATIONAL ARRIVALS – PROVINCIAL DISTRIBUTION



APPENDIX

INTERNATIONAL TOURIST ARRIVALS - PROVINCIAL DISTRIBUTION									
	Q4 2025								
	Gauteng	Western Cape	Eastern Cape	KwaZulu- Natal	Mpumalanga	Limpopo	North West	Northern Cape	Free State
Africa	**956 132**	**115 203**	**37 880**	**152 204**	**622 336**	**62 403**	**87 514**	**22 544**	**191 926**
Botswana	52 318	2 441	2 222	5 557	2 998	23 802	39 520	726	3 111
Lesotho	110 943	16 180	4 403	20 145	2 176	719	17 923	7 034	182 056
Malawi	43 636	5 771	234	3 919	91	935	665	708	234
Mozambique	90 013	6 327	3 097	1 980	466 516	1 791	9 219	0	167
Namibia	11 665	28 462	1 573	1 681	859	178	1 489	6 944	819
Swaziland	53 647	897	2 773	79 648	130 220	3 971	1 684	626	1 251
Zambia	39 350	4 139	1 349	7 706	714	716	1 384	210	215
Zimbabwe	489 460	30 835	18 637	25 369	16 517	28 461	13 326	6 156	3 325
Angola	6 532	2 195	81	253	125	43	77	0	86
Democratic Republic of Congo	10 259	924	422	518	0	247	0	0	262
Ethiopia	1 694	777	185	241	103	37	52	0	0
Ghana	6 812	2 953	255	248	248	396	604	0	0
Kenya	11 976	3 608	566	1 673	418	566	410	140	278
Nigeria	4 830	1 849	444	705	318	85	242	0	29
Tanzania	8 170	2 306	72	396	181	143	181	0	0
Uganda	3 172	1 123	225	305	153	0	234	0	80
Other Africa	11 656	4 416	1 341	1 860	698	314	504	0	10
Asia	**25 887**	**14 300**	**3 007**	**4 993**	**2 491**	**1 684**	**2 012**	**292**	**210**
China including Hong Kong	4 499	2 023	594	678	374	227	112	125	37
India	7 504	3 211	826	2 354	883	307	850	0	47
Japan	3 529	1 330	94	458	445	212	49	0	49
Malaysia	879	1 055	0	164	0	75	101	0	0
Singapore	1 391	1 357	110	110	514	0	0	0	0
South Korea	2 139	1 008	140	378	45	51	49	95	0
Other Asia	5 945	4 315	1 243	852	230	812	850	72	77
Australasia	**19 933**	**18 427**	**4 175**	**3 154**	**6 645**	**2 660**	**2 182**	**269**	**738**
Australia	16 319	15 938	3 311	2 750	5 781	2 421	1 722	154	683
New Zealand	3 614	2 447	863	404	863	239	459	115	55
Other Australasia	0	42	0	0	0	0	0	0	0
South America	**14 780**	**14 644**	**2 206**	**1 228**	**5 749**	**2 408**	**2 597**	**0**	**190**
Argentina	1 129	804	73	123	369	73	57	0	0
Brazil	10 634	12 382	1 641	661	4 578	1 725	2 057	0	190
Chile	714	514	51	65	100	124	75	0	0
Other Central & South America	2 303	945	441	379	701	485	410	0	0
Europe	**173 399**	**249 842**	**50 135**	**43 252**	**75 721**	**33 865**	**18 408**	**4 803**	**6 094**
Austria	3 774	4 835	806	1 135	2 123	1 294	416	0	0
Belgium	7 228	8 256	2 740	1 905	3 099	1 282	334	246	88
Denmark	2 624	3 015	614	392	1 199	909	168	0	59
Finland	685	1 648	272	142	624	80	80	0	0
France	14 755	21 622	3 978	5 269	10 882	3 134	1 039	360	631
Germany	36 987	62 726	13 661	11 390	21 723	8 538	4 356	1 015	977
Ireland	3 787	5 556	774	1 284	1 644	1 017	339	0	243
Italy	5 342	7 676	1 453	758	2 246	299	422	177	243
Netherlands	13 893	23 609	5 493	4 196	8 791	5 006	1 731	263	699
Norway	1 790	3 193	527	317	843	269	129	59	129
Portugal	2 268	2 470	358	250	708	118	162	0	43
Russian Fed	9 165	6 371	1 041	1 295	1 084	0	215	438	0
Spain	2 319	5 016	903	767	2 211	623	290	82	222
Sweden	3 408	7 050	1 448	677	1 421	837	671	159	159
Switzerland	6 082	10 403	1 776	1 447	3 932	1 821	561	170	0
Turkey	2 279	2 002	338	290	501	0	210	0	0
UK	48 511	68 158	11 875	9 911	10 091	6 910	6 081	1 550	2 220
Other Europe	8 503	6 237	2 078	1 827	2 600	1 727	1 204	284	379
Middle East	**5 788**	**2 810**	**546**	**490**	**527**	**192**	**771**	**185**	**127**
UAE	470	343	123	118	0	26	26	0	0
Other Middle East	5 318	2 467	423	373	527	167	745	185	127
North America	**50 738**	**51 609**	**8 642**	**9 381**	**20 908**	**13 145**	**6 742**	**1 684**	**1 503**
Canada	8 050	10 957	2 290	2 618	4 031	983	846	336	93
USA	42 689	40 652	6 352	6 763	16 877	12 162	5 897	1 348	1 410
TOTAL	**1 246 657**	**466 835**	**106 592**	**214 703**	**734 376**	**116 358**	**120 226**	**29 777**	**200 788**

TOP 20 ATTRACTIONS PER PROVCINCE

APPENDIX

	GAUTENG TOP 20 ATTRACTIONS		
	Q4 2019	Q4 2024	Q4 2025
Sandton City / Mandela Square	43.9%	43.9%	50.1%
Mall of Africa	4.2%	4.2%	18.4%
Apartheid Museum	24.0%	24.0%	15.7%
Did not visit any	17.9%	17.9%	14.2%
Menlyn Maine Shopping Centre	0.0%	0.0%	13.8%
Mandela House (Soweto)	14.7%	14.7%	13.3%
Tour of Soweto	12.8%	12.8%	12.1%
Eastgate Mall	12.4%	12.4%	11.5%
Constitution Hill	8.6%	8.6%	7.1%
Rhino and Lion Nature Reserve	10.6%	10.6%	6.2%
Rosebank	4.1%	4.1%	5.7%
Union Buildings	5.5%	5.5%	5.1%
Maboneng Precinct (e.g., Pop Art Theatre, Cinema, Gallery, etc.)	6.6%	6.6%	4.6%
Fourways	1.6%	1.6%	3.3%
Maropeng and Sterkfontein Caves (Cradle of Humankind)	4.5%	4.5%	3.2%
Braamfontein Neighbour Goods Market	10.4%	10.4%	2.7%
Walter Sisulu Botanical Gardens	1.6%	1.6%	2.5%
Eastrand Mall	1.9%	1.9%	2.0%
Montecasino	0.0%	0.0%	1.9%
Lesedi Cultural Village	1.7%	1.7%	1.7%
Newtown Market Theatre	1.7%	1.7%	1.6%

	WESTERN CAPE TOP 20 ATTRACTIONS		
	Q4 2019	Q4 2024	Q4 2025
V&A Waterfront	68.0%	68.0%	79.3%
Cape Town Central City	62.5%	62.5%	68.5%
Boulder National Park	40.2%	40.2%	63.9%
Camps Bay	62.9%	62.9%	60.5%
The Cape Winelands	43.0%	43.0%	57.5%
Cape Point	61.4%	61.4%	56.4%
Table Mountain Cableway	47.9%	47.9%	52.2%
Lion's Head	1.0%	1.0%	37.5%
Kirstenbosch Botanical Gardens	31.5%	31.5%	36.3%
Clifton Beach	30.5%	30.5%	33.1%
Canal Walk Shopping Centre	0.9%	0.9%	32.8%
Muizenberg Beach	18.7%	18.7%	30.6%
The Garden Route	29.5%	29.5%	26.5%
Hermanus	24.8%	24.8%	25.6%
Robben Island	18.4%	18.4%	22.2%
Table Mountain (not cableway)	31.2%	31.2%	20.8%
Tsitsikamma National Park	19.8%	19.8%	15.9%
Cango Caves	19.3%	19.3%	15.4%
Cape Agulhas	14.9%	14.9%	15.3%
Cape Town Whale watching	10.6%	10.6%	12.1%
Cape Town Ostrich Ranch / Cape Point Ostrich Farms	8.4%	8.4%	10.2%

APPENDIX

	EASTERN CAPE TOP 20 ATTRACTIONS		
	Q4 2019	Q4 2024	Q4 2025
Addo Elephant National Park	53.5%	53.5%	54.2%
Storms River	46.2%	46.2%	33.1%
Boardwalk Shopping Mall	14.1%	14.1%	22.5%
Did not visit any	11.4%	11.4%	21.7%
Bloukrans Bridge Bungy (Highest Bungee)	20.0%	20.0%	20.8%
Walmer Park	9.9%	9.9%	15.4%
Greenacres Mall	12.7%	12.7%	14.4%
Tree Top Canopy Tour, Tsitsikamma Forest	15.7%	15.7%	11.4%
Nelson Mandela Museum (Mthatha)	8.8%	8.8%	8.6%
Steve Biko Monument and Museum and Grave Site - (King William's Town, Ginsberg & East London)	2.9%	2.9%	6.9%
Wild Fly Fishing - Somerset East	1.7%	1.7%	5.5%
Valley of Desolation / Owl House / Karoo / Olive Schreiner Museum	5.0%	5.0%	5.4%
Nelson Mandela's Homestead / Gravesite (Qunu)	5.1%	5.1%	3.5%
Tiffendel Ski Resort	8.1%	8.1%	3.1%
Private Game Reserve	0.0%	0.0%	1.6%
Hemmingways Mall	0.6%	0.6%	1.4%
Amakhala Game Reserve	0.7%	0.7%	1.3%
Pumba Game reserve	0.1%	0.1%	1.0%
Baywest Mall	0.4%	0.4%	0.9%
Kings Beach	0.6%	0.6%	0.7%
Museums	0.1%	0.1%	0.6%
Coffee Bay	0.4%	0.4%	0.5%

	KwaZULU-NATAL TOP 20 ATTRACTIONS		
	Q4 2019	Q4 2024	Q4 2025
Durban North Coast (Umhlanga, Umdloti, Ballito, Zimbali, Salt Rock, Shaka's Rock)	24.6%	24.6%	31.1%
Gateway Mall	27.8%	27.8%	26.5%
Durban North Beach	22.2%	22.2%	24.6%
Drakensberg Mountains	40.1%	40.1%	22.9%
Did not visit any	4.9%	4.9%	21.4%
Drakensberg Gardens / Sani Pass / Amphitheatre / Cathedral Peak	26.2%	26.2%	20.1%
Elephant Coast (e.g. iSimangaliso Wetland Park World Heritage Site, Hluhluwe-iMfolozi, Tembe, Ndumu, Phinda)	28.4%	28.4%	18.2%
Durban South Beach	28.0%	28.0%	17.6%
uShaka Marine World	14.0%	14.0%	15.5%
La Lucia	16.8%	16.8%	13.3%
Pietermaritzburg and Midlands (Midlands Meander, Mooi River, Nottingham Road, Howick etc.)	7.4%	7.4%	12.6%
iSimangaliso Wetland Park	18.7%	18.7%	10.5%
Pavilion Mall	8.4%	8.4%	10.3%
Florida Road (Durban)	11.0%	11.0%	7.6%
Zululand cultural villages (Richards Bay, Eshowe, Shakaland, Ulundi, Nongoma)	6.8%	6.8%	6.3%
South Coast Beach Resorts and attractions (Amanzimtoti, Port Shepstone, Scottburgh, Margate, Southbroom, Port Edward)	1.9%	1.9%	6.0%
Royal Natal National Park	11.0%	11.0%	5.0%
Moses Mabhida Stadium	5.2%	5.2%	4.0%
Valley of 1000 Hills (Phezulu, Krantzkloof Nature Reserve)	2.4%	2.4%	3.4%
Sodwana Bay	4.0%	4.0%	3.4%
Sun Coast Casino	4.8%	4.8%	2.5%

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	MPUMALANGA TOP 20 ATTRACTIONS		
	Q4 2019	Q4 2024	Q4 2025
Kruger Park via Skukuza, Numbi, Malelane, Crocodile Bridge	87.4%	87.4%	85.8%
Blyde River Canyon / God's Window	53.6%	53.6%	53.6%
Bourke's Luck Potholes	26.3%	26.3%	27.5%
Panorama Route	26.6%	26.6%	25.4%
Hazyview (Cable slide, Hot air ballooning, Abseiling, Elephant Sanctuary, Game drives, etc.)	17.7%	17.7%	23.4%
Three Rondavels	0.3%	0.3%	19.1%
Pilgrim's Rest	13.8%	13.8%	14.0%
Sabie	9.2%	9.2%	12.1%
Hazyview Mall	11.6%	11.6%	11.3%
White river	13.1%	13.1%	9.8%
Did not visit any	1.7%	1.7%	7.2%
Dullstroom fly fishing	4.0%	4.0%	7.1%
Sabi Sands Game Reserve	6.9%	6.9%	6.9%
Nelspruit Botanical Gardens	5.4%	5.4%	6.7%
The Pinnacle	7.9%	7.9%	5.7%
Crocriver Enviro Park	3.9%	3.9%	5.4%
Sabi Sabi Game Reserve	5.6%	5.6%	5.1%
Mala Mala Game Reserve	1.5%	1.5%	4.5%
Lydenburg (Voortrekker graves, Mapoch's caves, Gustav Klingbiel Nature Reserve etc.)	3.8%	3.8%	4.4%
Sadwala Caves	4.0%	4.0%	3.6%
Longtom Pass	3.2%	3.2%	2.9%

	LIMPOPO TOP 20 ATTRACTIONS		
	Q4 2019	Q4 2024	Q4 2025
Kruger National Park via Orpen, Phalaborwa, Punda Maria	69.4%	69.4%	66.2%
Mapungubwe National Park	0.5%	0.5%	19.5%
Bela Bela Conservancy	12.7%	12.7%	16.7%
Did not visit any	8.9%	8.9%	9.0%
Nandoni Dam	3.9%	3.9%	4.1%
Mapungubwe Cultural Landscape	7.1%	7.1%	3.9%
The Chuene Resort	1.8%	1.8%	2.6%
Ga (modjadji) / Motjaji	3.8%	3.8%	2.3%
Timbavati Game Reserve	0.3%	0.3%	2.2%
Names of Resorts/Safari	0.0%	0.0%	2.1%
Mall of the North	0.0%	0.0%	1.7%
Soutpansberg Mountains	4.5%	4.5%	1.6%
Kapama Game Reserve	2.2%	2.2%	1.3%
Private Game Reserves	0.0%	0.0%	1.2%
Welgevanden Game Reserve	0.0%	0.0%	1.1%
Mabula Game Reserve	0.3%	0.3%	1.1%
Mabalingwe Nature Reserve	0.8%	0.8%	1.0%
Not applicable	0.0%	0.0%	0.8%
Polokwane Game Reserve	0.0%	0.0%	0.8%
Sebatana Private Reserve	0.0%	0.0%	0.6%
Makalali Game Reserve	0.0%	0.0%	0.6%
Thorny Bush Game Reserve	0.3%	0.3%	0.5%

APPENDIX

	NORTH WEST TOP 20 ATTRACTIONS		
	Q4 2019	Q4 2024	Q4 2025
Pilanesberg National Park	52.8%	52.8%	49.3%
Sun City Lost City	32.4%	32.4%	26.2%
Hartbeespoort Dam	22.3%	22.3%	12.7%
Waterfall Mall (Rustenburg)	4.3%	4.3%	11.6%
Did not visit any	12.2%	12.2%	8.2%
North-West University, Potchefstroom Campus	4.3%	4.3%	7.7%
Madikwe Game Reserve	10.7%	10.7%	7.0%
Hartbeespoort - Snake Park	4.8%	4.8%	6.9%
Klerksdorp Mall	1.6%	1.6%	6.6%
The cradle of humankind	7.6%	7.6%	5.3%
Magaliesburg Resort	2.3%	2.3%	4.4%
Mafikeng Mall	0.6%	0.6%	3.4%
Brits Mall	3.2%	3.2%	3.2%
Mooi River Mall	0.8%	0.8%	3.0%
Ukutula Game Lodge	0.1%	0.1%	1.8%
Upside-down House	0.0%	0.0%	1.7%
Barberspan Bird Sanctuary	1.2%	1.2%	1.4%
Bloemhof Dam Nature Reserve	0.0%	0.0%	1.1%
Rustenburg shopping mall	0.0%	0.0%	0.8%
Village Mall	0.0%	0.0%	0.7%
Vredefort crater / Vredefort Dome	0.0%	0.0%	0.7%
Elephant / Monkey Santuary	0.0%	0.0%	0.7%

	NORTHERN CAPE TOP 20 ATTRACTIONS		
	Q4 2019	Q4 2024	Q4 2025
Did not visit any	23.4%	23.4%	32.5%
Kimberley Big Hole	24.7%	24.7%	31.2%
Diamond Pavilion Mall	15.8%	15.8%	24.2%
Kgalagadi Transfrontier Park	33.1%	33.1%	21.6%
Augrabies Falls	32.4%	32.4%	18.6%
Kimberley Mine Museum	11.3%	11.3%	15.2%
Namaqualand Flowers	13.9%	13.9%	8.8%
Mokala National Park	12.1%	12.1%	7.8%
Blue flag beach at Mcdougal Bay	8.2%	8.2%	4.7%
Sutherland and Carnarvon - Stargazing (Salt and SKA)	2.6%	2.6%	2.2%
North Cape Mall	0.0%	0.0%	1.7%
San Cultural Villages (e.g. Khomani San Village etc) (Specify)	5.8%	5.8%	1.4%
Diamond Pavillion Shopping Centre	0.0%	0.0%	0.9%
Kathu Village Mall	0.8%	0.8%	0.9%
Unspecified Shopping Mall	0.0%	0.0%	0.4%

APPENDIX

	FREE STATE TOP 20 ATTRACTIONS		
	Q4 2019	Q4 2024	Q4 2025
Did not visit any	32.4%	32.4%	41.2%
Mimosa Mall	21.5%	21.5%	20.1%
Golden Gate Highlands National Park	26.2%	26.2%	16.6%
Waterfront	14.7%	14.7%	16.5%
Welkom Mall	8.2%	8.2%	11.3%
University of the Free State	7.2%	7.2%	4.3%
Free State Stadium/Vodacom Park	6.4%	6.4%	4.3%
Gariep Dam	7.6%	7.6%	2.6%
Black Mountain Hotel	2.3%	2.3%	2.5%
Basotho cultural village	6.5%	6.5%	2.5%
Clarens Ash River Outfall	3.4%	3.4%	2.2%
Northridge Mall	0.0%	0.0%	1.9%
Sterkfontein Dam Nature Reserve	7.7%	7.7%	0.9%
Maluti Cave Hiking Trail	6.0%	6.0%	0.9%
Dihlabeng Mall	0.0%	0.0%	0.8%
Galleries or Museums	0.0%	0.0%	0.8%
Galleries or Museums	0.0%	0.0%	0.8%
Bushmen Paintings in Schaaplaats	3.5%	3.5%	0.7%
Bethlahem Mall	0.8%	0.8%	0.7%
Sasolburg Mall	0.0%	0.0%	0.6%
Cheetah Experience	9.0%	9.0%	0.3%

PROVINCIAL TOP 20 VISITED ATTRACTIONS BY SOURCE MARKETS

APPENDIX

	GAUTENG TOP 20 ATTRACTIONS BY SOURCE MARKETS - Q4 2025																			
	Sandton City / Mandela Square	Mall of Africa	Apartheid Museum	Did not visit any	Menlyn Maine Shopping Centre	Mandela House (Soweto)	Tour of Soweto	Eastgate Mall	Constitution Hill	Rhino and Lion Nature Reserve	Rosebank	Union Buildings	Maboneng Precinct (e.g., Pop Art Theatre, Cinema, Gallery, etc.)	Fourways	Maropeng and Sterkfontein Caves (Cradle of Humankind)	Braamfontein Neighbour Goods Market	Walter Sisulu Botanical Gardens	Eastrand Mall	Montecasino	Lesedi Cultural Village
AFRICA	**46.9%**	**22.9%**	**4.0%**	**12.9%**	**15.3%**	**4.7%**	**3.0%**	**18.2%**	**2.0%**	**1.5%**	**7.4%**	**3.3%**	**1.5%**	**5.6%**	**0.4%**	**1.3%**	**1.3%**	**3.0%**	**2.2%**	**0.1%**
Botswana	47.8%	34.5%	2.2%	18.6%	11.8%	3.2%	0.0%	8.3%	1.0%	0.0%	6.4%	2.2%	0.0%	10.1%	0.0%	0.0%	1.2%	2.7%	2.7%	0.0%
Lesotho	49.9%	30.8%	0.0%	12.6%	11.5%	0.0%	0.0%	24.1%	0.0%	0.0%	12.6%	0.0%	0.0%	19.3%	0.0%	0.0%	0.0%	6.7%	12.6%	0.0%
Malawi	44.7%	15.8%	3.1%	10.8%	10.9%	4.9%	3.1%	22.6%	3.1%	0.0%	7.4%	2.6%	0.0%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mozambique	51.0%	25.3%	1.4%	10.9%	19.5%	0.7%	0.7%	28.7%	1.4%	0.8%	10.8%	1.5%	0.0%	3.7%	0.7%	0.8%	0.0%	0.0%	2.1%	0.0%
Namibia	40.5%	24.7%	7.2%	18.1%	13.4%	4.5%	2.5%	14.2%	2.5%	1.9%	9.0%	3.2%	5.3%	4.1%	0.9%	2.4%	0.9%	5.6%	4.6%	0.9%
Eswatini	40.8%	13.7%	0.0%	18.2%	4.6%	0.0%	4.5%	13.7%	0.0%	0.0%	0.0%	4.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zambia	46.7%	23.3%	2.2%	14.1%	15.2%	1.2%	0.6%	9.3%	0.0%	0.0%	10.9%	3.8%	1.2%	7.0%	0.0%	1.2%	0.0%	4.7%	3.2%	0.0%
Zimbabwe	46.3%	23.1%	2.5%	11.3%	12.9%	3.1%	1.7%	18.4%	2.0%	0.9%	6.7%	1.8%	2.2%	7.3%	0.9%	1.7%	1.5%	4.6%	2.3%	0.0%
Angola	46.6%	22.9%	3.5%	4.5%	41.8%	0.7%	0.7%	31.7%	2.8%	0.6%	9.8%	3.9%	2.2%	6.8%	0.7%	0.7%	1.4%	0.0%	6.1%	0.0%
DRC	48.0%	18.3%	10.6%	16.5%	12.3%	4.1%	1.7%	20.8%	1.7%	0.0%	2.6%	2.4%	0.0%	4.1%	0.0%	2.4%	0.8%	1.6%	0.9%	0.0%
Ethiopia	39.9%	18.5%	5.1%	11.9%	22.4%	10.3%	2.9%	23.6%	0.0%	2.2%	5.8%	5.2%	0.0%	0.0%	0.0%	2.2%	0.0%	0.0%	0.0%	0.0%
Ghana	57.8%	22.3%	7.3%	14.4%	14.9%	14.5%	9.0%	12.8%	3.5%	7.5%	7.2%	9.1%	1.9%	3.9%	0.0%	0.0%	3.6%	0.0%	0.0%	0.0%
Kenya	42.8%	22.4%	3.4%	10.6%	22.1%	7.0%	6.9%	12.7%	1.2%	1.1%	7.1%	5.9%	1.1%	3.6%	0.0%	0.0%	3.4%	3.3%	1.2%	0.0%
Nigeria	56.7%	23.8%	3.7%	10.3%	18.6%	11.7%	6.1%	12.1%	1.1%	2.5%	10.8%	4.8%	3.6%	4.0%	0.0%	2.4%	3.6%	2.9%	1.1%	0.5%
Tanzania	48.1%	33.9%	8.8%	8.9%	16.3%	12.3%	7.5%	23.4%	4.8%	2.2%	7.0%	6.2%	1.8%	5.8%	0.0%	0.0%	0.9%	0.9%	0.9%	0.0%
Uganda	40.4%	23.9%	9.9%	14.2%	19.3%	7.4%	7.4%	23.5%	7.1%	0.0%	2.3%	7.6%	2.5%	2.5%	0.0%	7.3%	2.5%	0.0%	0.0%	0.0%
Other Africa	48.1%	13.2%	5.3%	20.5%	11.0%	8.0%	5.5%	20.8%	2.8%	7.6%	9.3%	3.1%	0.0%	3.4%	0.0%	1.1%	1.7%	4.1%	2.0%	1.3%
ASIA	**57.2%**	**27.5%**	**9.6%**	**12.3%**	**15.5%**	**8.5%**	**8.0%**	**10.9%**	**4.0%**	**8.4%**	**5.3%**	**3.7%**	**2.3%**	**3.2%**	**2.0%**	**1.3%**	**3.4%**	**1.9%**	**2.1%**	**1.1%**
China including Hong Kong	65.0%	21.8%	6.4%	10.4%	15.8%	3.8%	3.2%	10.1%	3.4%	3.3%	5.2%	3.8%	2.2%	4.0%	0.7%	2.2%	1.8%	1.3%	1.7%	0.0%
India	56.7%	32.3%	10.2%	13.3%	16.5%	10.9%	7.7%	10.8%	5.1%	12.3%	6.5%	4.8%	1.7%	1.9%	1.7%	1.9%	3.5%	2.9%	0.0%	1.1%
Japan	50.5%	14.7%	8.8%	23.2%	14.6%	7.5%	6.3%	4.4%	4.4%	3.1%	4.4%	1.9%	1.3%	1.9%	1.3%	0.0%	0.0%	1.9%	1.3%	0.0%
Malaysia	84.4%	25.7%	31.5%	0.0%	0.0%	20.0%	11.5%	14.2%	20.0%	0.0%	0.0%	11.5%	11.5%	8.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Singapore	61.2%	30.7%	7.8%	7.9%	15.9%	14.9%	15.0%	7.1%	7.8%	7.8%	7.8%	0.0%	7.9%	7.1%	15.8%	7.9%	7.8%	7.9%	0.0%	7.8%
South Korea	52.4%	34.2%	7.0%	4.6%	22.3%	2.4%	4.7%	4.4%	0.0%	9.1%	7.0%	2.3%	0.0%	4.4%	0.0%	0.0%	2.3%	2.1%	0.0%	2.1%
Other Asia	52.8%	30.4%	9.9%	11.8%	14.2%	8.6%	12.1%	18.3%	1.1%	11.6%	4.2%	3.4%	1.7%	2.9%	1.4%	0.0%	6.4%	0.0%	7.1%	1.0%
AUSTRALASIA	**38.9%**	**20.2%**	**13.0%**	**19.3%**	**15.9%**	**13.8%**	**12.4%**	**9.6%**	**8.0%**	**8.7%**	**5.0%**	**3.6%**	**2.8%**	**3.2%**	**2.9%**	**0.9%**	**2.6%**	**2.7%**	**2.7%**	**2.3%**
Australia	39.4%	18.6%	13.5%	21.5%	15.5%	13.7%	12.0%	11.1%	8.7%	9.5%	5.4%	3.7%	2.3%	3.2%	2.2%	1.0%	2.8%	1.1%	2.9%	2.8%
New Zealand	37.0%	27.1%	10.9%	9.4%	17.5%	14.1%	14.1%	3.2%	4.8%	4.7%	3.3%	3.2%	4.8%	3.2%	6.4%	0.0%	1.5%	9.5%	1.7%	0.0%
Other Australia	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
CENTRAL & SOUTH AMERICA	**53.8%**	**14.7%**	**44.8%**	**12.7%**	**6.3%**	**29.2%**	**30.4%**	**5.0%**	**19.5%**	**11.9%**	**5.1%**	**8.6%**	**7.8%**	**2.7%**	**0.5%**	**1.2%**	**1.3%**	**0.5%**	**3.1%**	**1.4%**
Argentina	50.0%	18.5%	39.4%	6.3%	14.5%	39.2%	25.2%	2.7%	17.6%	10.0%	9.2%	9.7%	5.5%	0.0%	2.7%	2.7%	0.0%	2.3%	2.7%	2.1%
Brazil	55.9%	12.5%	50.4%	13.5%	4.5%	32.9%	34.8%	6.1%	22.9%	13.0%	4.7%	7.9%	9.4%	3.2%	0.0%	1.4%	1.4%	0.0%	3.0%	1.6%
Chile	50.2%	16.4%	37.3%	12.7%	14.0%	19.1%	27.1%	0.0%	12.0%	9.3%	5.8%	7.1%	4.7%	0.0%	4.7%	0.0%	4.7%	0.0%	2.4%	2.4%
Other Central & South America	46.6%	22.0%	24.0%	12.4%	7.7%	10.4%	13.5%	2.9%	7.1%	8.3%	5.2%	12.1%	2.5%	2.6%	0.7%	0.0%	0.0%	2.4%	4.2%	0.0%
EUROPE	**51.4%**	**13.0%**	**22.8%**	**15.8%**	**12.1%**	**17.1%**	**16.7%**	**6.6%**	**9.1%**	**9.0%**	**4.9%**	**6.7%**	**7.0%**	**1.8%**	**5.3%**	**4.2%**	**3.2%**	**1.5%**	**1.4%**	**2.5%**
Austria	44.9%	7.7%	32.0%	20.9%	15.0%	21.8%	17.1%	3.0%	8.4%	13.4%	9.9%	10.8%	7.7%	0.0%	19.0%	13.1%	8.4%	0.0%	0.0%	5.4%
Belgium	51.5%	13.1%	27.2%	15.2%	4.6%	26.1%	23.9%	8.4%	15.5%	7.0%	5.8%	8.3%	8.4%	1.2%	7.0%	5.8%	4.6%	1.2%	1.2%	3.6%
Denmark	45.8%	8.8%	33.0%	21.5%	15.1%	31.0%	24.3%	0.0%	8.7%	10.9%	4.2%	15.3%	8.7%	0.0%	2.3%	6.5%	2.1%	0.0%	4.5%	4.5%
Finland	32.4%	0.0%	16.2%	27.9%	9.0%	27.9%	20.7%	0.0%	0.0%	23.5%	0.0%	16.2%	0.0%	0.0%	7.3%	0.0%	7.3%	0.0%	0.0%	0.0%
France	53.1%	10.6%	36.4%	10.0%	8.3%	32.2%	31.6%	6.1%	12.8%	11.7%	4.5%	8.1%	7.6%	0.0%	5.9%	4.9%	2.0%	1.5%	0.0%	3.9%
Germany	55.8%	10.2%	27.6%	14.4%	10.6%	21.1%	20.7%	7.7%	13.4%	10.1%	5.2%	8.4%	11.8%	1.3%	6.0%	6.0%	3.8%	0.9%	0.5%	3.9%
Ireland	48.0%	18.2%	17.2%	16.6%	10.5%	14.7%	17.6%	5.1%	8.6%	8.6%	2.9%	6.1%	6.1%	6.1%	5.1%	0.0%	0.0%	3.5%	7.1%	3.5%
Italy	56.8%	12.0%	27.6%	20.0%	9.8%	12.0%	18.8%	1.0%	5.6%	11.0%	4.3%	6.8%	8.5%	0.0%	3.2%	5.5%	7.6%	2.3%	3.3%	4.4%
The Netherlands	50.3%	13.9%	21.3%	12.5%	14.4%	17.7%	16.5%	6.9%	7.7%	7.6%	3.8%	3.8%	3.2%	1.9%	5.7%	3.8%	1.9%	1.2%	0.6%	1.9%
Norway	53.5%	15.6%	37.2%	11.1%	11.7%	26.1%	33.3%	11.1%	18.3%	15.6%	0.0%	3.9%	15.6%	0.0%	11.1%	7.8%	3.9%	0.0%	0.0%	7.2%
Portugal	61.1%	12.8%	13.0%	16.4%	21.1%	9.2%	9.7%	21.0%	7.2%	4.7%	11.1%	5.8%	5.3%	7.2%	0.0%	0.0%	5.8%	3.3%	8.6%	0.0%
Russian Federation	50.1%	4.4%	7.5%	33.1%	4.7%	4.9%	7.5%	2.3%	0.0%	2.6%	2.6%	2.2%	0.0%	0.0%	2.6%	0.0%	0.0%	0.0%	0.0%	0.0%
Spain	38.5%	6.3%	36.2%	26.6%	10.0%	20.8%	26.6%	6.5%	12.7%	13.1%	0.0%	15.8%	3.5%	3.1%	0.0%	6.5%	3.5%	0.0%	3.1%	0.0%
Sweden	53.8%	5.7%	20.2%	15.4%	20.7%	19.2%	21.2%	5.5%	4.9%	7.6%	5.5%	10.3%	6.6%	0.0%	3.7%	1.8%	5.8%	1.9%	0.0%	0.0%
Switzerland	53.0%	14.7%	29.9%	13.4%	10.4%	18.2%	16.4%	5.8%	9.1%	9.1%	4.2%	7.4%	10.7%	1.4%	8.8%	2.8%	2.8%	0.0%	1.4%	3.1%
Turkey	74.5%	12.8%	18.4%	16.3%	9.2%	9.2%	18.3%	3.6%	5.6%	9.2%	3.6%	9.2%	9.2%	0.0%	3.6%	9.2%	5.6%	0.0%	0.0%	0.0%
Uk	47.6%	18.1%	15.4%	15.1%	13.1%	10.4%	8.4%	7.4%	6.2%	7.9%	5.1%	4.0%	3.7%	3.5%	2.3%	3.0%	2.4%	2.7%	2.2%	1.7%
Other Europe	50.3%	13.6%	20.9%	14.7%	27.5%	13.4%	13.4%	5.5%	11.9%	10.4%	8.7%	10.3%	11.7%	0.0%	15.8%	3.0%	6.2%	0.0%	0.0%	0.2%
MIDDLE EAST	**51.3%**	**27.3%**	**12.2%**	**9.7%**	**17.0%**	**8.9%**	**4.1%**	**14.7%**	**4.9%**	**3.2%**	**4.3%**	**1.6%**	**1.0%**	**1.6%**	**1.0%**	**0.5%**	**0.5%**	**2.4%**	**2.1%**	**0.5%**
United Arab Emirates	50.2%	37.8%	0.0%	14.5%	20.9%	0.0%	0.0%	12.4%	0.0%	7.2%	7.0%	7.0%	0.0%	7.0%	0.0%	0.0%	0.0%	0.0%	12.7%	0.0%
Other Middle East	51.4%	26.4%	13.3%	9.2%	16.6%	9.7%	4.5%	15.0%	5.3%	2.8%	4.1%	1.1%	1.1%	1.2%	1.1%	0.5%	0.5%	2.6%	1.1%	0.6%
NORTH AMERICA	**56.3%**	**16.8%**	**27.6%**	**13.0%**	**14.1%**	**27.6%**	**25.4%**	**7.9%**	**15.6%**	**9.2%**	**3.2%**	**6.7%**	**8.3%**	**1.2%**	**7.2%**	**4.2%**	**4.4%**	**0.5%**	**1.8%**	**4.2%**
Canada	44.7%	14.6%	26.7%	11.9%	21.1%	27.8%	28.2%	5.3%	11.4%	10.6%	1.1%	8.2%	6.0%	0.0%	7.5%	5.4%	1.2%	2.1%	1.9%	2.0%
USA	58.5%	17.2%	27.7%	13.2%	12.8%	27.6%	24.9%	8.4%	16.4%	8.9%	3.6%	6.4%	8.7%	1.5%	7.1%	4.0%	5.1%	0.2%	1.8%	4.6%
Other North America	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
TOTAL	**50.1%**	**18.4%**	**15.7%**	**14.2%**	**13.8%**	**13.3%**	**12.1%**	**11.5%**	**7.1%**	**6.2%**	**5.7%**	**5.1%**	**4.6%**	**3.3%**	**3.2%**	**2.7%**	**2.5%**	**2.0%**	**1.9%**	**1.7%**

APPENDIX

	V&A Waterfront	Cape Town Central City	Boulder National Park	Camps Bay	The Cape Winelands	Cape Point	Table Mountain Cableway	Lion's Head	Kirstenbosch Botanical Gardens	Clifton Beach	Canal Walk Shopping Centre	Muizenberg Beach	The Garden Route	Hermanus	Robben Island	Table Mountain (not cableway)	Tsitsikamma National Park	Cango Caves	Cape Agulhas	Cape Town Whale watching
	WESTERN CAPE TOP 20 ATTRACTIONS BY SOURCE MARKETS - Q4 2025																			
AFRICA	**78.3%**	**48.5%**	**26.0%**	**49.6%**	**31.9%**	**30.1%**	**38.2%**	**22.6%**	**12.8%**	**22.2%**	**37.7%**	**13.9%**	**5.6%**	**3.9%**	**12.1%**	**10.8%**	**3.6%**	**3.9%**	**4.2%**	**5.7%**
Botswana	67.5%	46.4%	12.5%	58.0%	37.0%	17.0%	41.7%	22.0%	0.0%	20.3%	52.2%	29.5%	0.0%	0.0%	11.9%	17.0%	0.0%	0.0%	0.0%	0.0%
Lesotho	80.3%	40.2%	0.0%	80.3%	0.0%	40.2%	20.5%	0.0%	0.0%	0.0%	39.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Malawi	73.0%	51.4%	18.6%	34.9%	13.3%	24.8%	29.6%	10.7%	10.7%	5.3%	54.4%	21.6%	0.0%	5.7%	13.3%	16.4%	0.0%	7.9%	7.9%	5.3%
Mozambique	78.8%	48.5%	22.0%	36.3%	29.5%	28.0%	22.0%	7.6%	0.0%	7.6%	41.7%	7.6%	0.0%	7.6%	7.6%	13.6%	0.0%	0.0%	7.6%	7.6%
Namibia	82.7%	72.4%	34.0%	58.8%	37.8%	25.6%	25.0%	23.3%	18.6%	27.3%	39.9%	17.0%	6.6%	9.1%	12.7%	10.5%	5.7%	6.8%	5.7%	7.5%
Eswatini	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zambia	80.7%	27.2%	9.2%	25.2%	0.0%	12.5%	35.8%	19.5%	9.2%	16.2%	25.2%	11.2%	10.6%	0.0%	12.7%	3.3%	3.5%	0.0%	0.0%	0.0%
Zimbabwe	78.2%	34.1%	22.7%	38.5%	26.9%	22.7%	35.4%	26.0%	10.0%	26.3%	39.1%	15.1%	4.3%	1.7%	9.4%	17.6%	0.0%	1.7%	1.7%	11.1%
Angola	76.5%	65.0%	36.8%	70.2%	52.2%	62.2%	40.5%	25.4%	37.2%	32.1%	53.5%	17.0%	10.0%	14.1%	19.6%	9.6%	9.6%	11.7%	6.5%	4.1%
DRC	73.3%	20.6%	25.9%	37.0%	10.3%	25.9%	37.0%	10.3%	10.3%	37.9%	28.4%	8.6%	0.0%	0.0%	17.3%	8.6%	0.0%	0.0%	0.0%	0.0%
Ethiopia	64.4%	40.0%	24.4%	34.9%	35.6%	46.7%	24.4%	28.9%	4.8%	12.7%	11.4%	4.8%	0.0%	0.0%	11.1%	0.0%	6.7%	6.3%	6.3%	0.0%
Ghana	87.8%	58.9%	20.9%	79.3%	38.5%	37.7%	66.8%	21.0%	13.1%	37.6%	49.7%	17.3%	4.5%	0.0%	8.6%	8.9%	8.4%	0.0%	8.4%	4.5%
Kenya	84.4%	49.6%	23.2%	57.1%	38.6%	26.4%	57.6%	34.6%	19.3%	15.6%	30.7%	11.6%	3.7%	0.0%	0.0%	11.4%	0.0%	0.0%	0.0%	0.0%
Nigeria	89.2%	45.7%	26.8%	41.1%	21.9%	33.6%	38.0%	22.8%	4.5%	21.2%	33.9%	12.7%	3.2%	0.0%	14.6%	4.9%	3.1%	8.0%	3.1%	1.7%
Tanzania	76.6%	32.8%	23.5%	57.8%	48.7%	51.6%	39.1%	15.7%	7.8%	9.5%	21.8%	6.2%	9.5%	4.7%	18.8%	7.9%	0.0%	7.9%	3.1%	0.0%
Uganda	87.1%	39.7%	33.7%	54.5%	53.2%	46.7%	40.2%	20.1%	20.1%	20.1%	13.1%	6.5%	20.1%	6.5%	19.5%	13.1%	13.6%	13.7%	13.0%	0.0%
Other Africa	65.0%	50.5%	39.7%	39.5%	32.1%	33.7%	44.5%	23.3%	9.8%	18.7%	38.0%	9.4%	8.2%	4.3%	20.1%	4.9%	7.7%	3.1%	7.5%	11.7%
ASIA	**82.8%**	**71.5%**	**62.1%**	**58.1%**	**48.1%**	**54.6%**	**53.8%**	**31.5%**	**28.9%**	**37.2%**	**31.0%**	**32.0%**	**16.4%**	**22.0%**	**24.1%**	**17.6%**	**10.1%**	**10.7%**	**10.2%**	**12.2%**
China including Hong Kong	78.9%	66.6%	52.3%	47.8%	42.9%	43.6%	32.4%	22.0%	26.9%	26.5%	29.2%	20.6%	9.4%	12.7%	10.4%	15.9%	12.4%	10.8%	8.1%	14.1%
India	86.7%	73.4%	69.8%	69.2%	48.9%	55.0%	56.5%	32.5%	29.9%	36.8%	42.3%	33.6%	17.4%	22.6%	26.1%	17.1%	13.4%	17.1%	11.6%	17.1%
Japan	57.0%	57.3%	61.8%	69.2%	49.5%	55.4%	39.1%	35.4%	41.5%	36.0%	23.0%	27.7%	19.1%	32.6%	13.5%	29.2%	17.2%	15.4%	14.4%	3.7%
Malaysia	73.7%	84.5%	53.6%	57.1%	47.7%	39.3%	67.8%	44.0%	34.6%	41.6%	30.9%	45.2%	19.0%	22.6%	16.7%	5.9%	0.0%	5.9%	15.5%	16.7%
Singapore	100.0%	76.5%	92.0%	62.1%	68.6%	44.3%	75.8%	31.5%	37.8%	47.6%	38.7%	38.7%	30.7%	52.5%	22.5%	23.5%	22.6%	22.6%	8.1%	22.6%
South Korea	67.0%	52.5%	47.6%	38.7%	47.6%	48.0%	38.7%	27.7%	9.4%	19.3%	33.4%	23.8%	14.0%	9.9%	32.7%	5.0%	9.0%	4.5%	4.5%	4.5%
Other Asia	90.1%	76.4%	57.0%	54.6%	43.3%	67.8%	59.4%	32.0%	25.6%	42.7%	23.1%	34.2%	13.6%	15.6%	32.7%	19.2%	3.3%	3.4%	9.4%	7.7%
AUSTRALASIA	**74.1%**	**58.3%**	**57.4%**	**50.1%**	**52.9%**	**50.5%**	**47.0%**	**35.8%**	**27.0%**	**26.7%**	**18.5%**	**18.6%**	**21.6%**	**14.1%**	**17.1%**	**24.7%**	**10.1%**	**10.4%**	**16.9%**	**7.2%**
Australia	74.3%	59.3%	56.8%	51.4%	52.9%	50.2%	46.1%	38.5%	26.2%	27.4%	18.5%	19.7%	22.0%	13.1%	15.9%	25.7%	10.2%	11.3%	16.7%	7.2%
New Zealand	72.2%	51.6%	62.7%	42.2%	53.7%	53.5%	53.5%	18.4%	32.5%	23.1%	18.8%	11.6%	18.8%	21.0%	25.5%	18.4%	9.4%	4.7%	18.6%	6.9%
Other Australia	100.0%	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
CENTRAL & SOUTH AMERICA	**86.8%**	**63.3%**	**78.3%**	**71.0%**	**55.7%**	**70.8%**	**75.2%**	**43.9%**	**28.0%**	**36.8%**	**12.4%**	**30.7%**	**31.4%**	**12.4%**	**13.3%**	**27.0%**	**10.5%**	**4.5%**	**12.8%**	**7.3%**
Argentina	96.8%	64.9%	70.4%	57.7%	55.2%	61.5%	83.8%	34.4%	26.8%	40.9%	19.9%	35.1%	27.7%	15.3%	19.4%	35.9%	12.3%	9.6%	13.0%	9.4%
Brazil	86.5%	63.9%	79.4%	73.1%	54.9%	71.4%	75.7%	44.5%	29.0%	38.4%	12.4%	31.1%	32.3%	11.8%	11.8%	28.0%	11.0%	4.4%	13.2%	7.9%
Chile	95.4%	74.9%	58.6%	64.8%	53.1%	50.6%	72.8%	40.7%	29.6%	16.3%	9.9%	24.4%	22.8%	16.3%	16.3%	14.8%	16.3%	8.0%	13.3%	0.0%
Other Central & South America	78.8%	46.9%	81.7%	58.4%	69.0%	81.6%	62.0%	45.6%	15.2%	23.8%	6.5%	25.2%	27.7%	15.8%	25.2%	13.6%	0.1%	0.0%	7.2%	1.8%
EUROPE	**79.7%**	**73.3%**	**69.0%**	**63.0%**	**62.2%**	**59.8%**	**53.0%**	**40.6%**	**41.8%**	**35.3%**	**36.1%**	**34.6%**	**31.1%**	**31.2%**	**24.3%**	**22.2%**	**20.2%**	**18.2%**	**17.7%**	**14.3%**
Austria	86.4%	64.2%	76.7%	75.7%	68.7%	66.2%	64.0%	49.6%	43.0%	39.7%	39.5%	36.7%	39.4%	42.3%	19.0%	27.1%	30.6%	26.2%	21.8%	12.8%
Belgium	82.8%	69.1%	71.4%	54.5%	62.0%	64.9%	58.4%	43.4%	44.3%	36.3%	36.0%	43.1%	31.1%	40.6%	38.3%	16.6%	24.8%	17.8%	20.9%	11.4%
Denmark	71.9%	75.2%	66.3%	62.3%	50.6%	67.9%	52.9%	34.2%	35.3%	24.3%	37.6%	28.0%	24.5%	29.9%	26.7%	13.3%	24.6%	22.5%	17.0%	22.5%
Finland	81.7%	68.9%	85.4%	63.6%	80.5%	65.2%	62.2%	50.1%	39.7%	19.1%	50.1%	20.2%	45.7%	31.1%	10.9%	42.0%	21.3%	24.3%	18.8%	15.8%
France	78.8%	78.1%	74.0%	61.2%	64.9%	66.5%	57.7%	39.4%	42.4%	39.9%	35.7%	30.3%	32.6%	31.8%	22.9%	23.8%	22.5%	17.8%	24.8%	12.6%
Germany	80.3%	77.4%	72.4%	65.8%	59.8%	57.9%	55.3%	42.5%	43.0%	34.5%	33.7%	35.7%	35.8%	28.1%	21.2%	24.3%	19.6%	16.1%	16.8%	13.2%
Ireland	78.2%	65.1%	57.7%	70.1%	60.4%	47.7%	50.3%	44.8%	36.8%	42.2%	31.6%	39.7%	35.9%	28.5%	24.8%	24.6%	22.4%	22.4%	23.6%	12.2%
Italy	81.8%	70.2%	67.8%	63.6%	56.5%	56.7%	50.6%	35.3%	40.9%	33.2%	28.0%	32.4%	23.2%	28.2%	21.4%	16.4%	16.4%	16.3%	13.9%	13.7%
The Netherlands	78.1%	68.6%	68.6%	55.5%	58.2%	59.2%	46.5%	39.6%	41.5%	32.3%	33.4%	36.2%	33.0%	37.5%	27.0%	15.5%	22.5%	22.2%	17.0%	13.6%
Norway	85.0%	75.1%	81.3%	63.3%	68.9%	55.7%	57.9%	37.7%	43.6%	36.3%	52.0%	42.1%	24.9%	38.4%	41.8%	23.1%	24.6%	20.9%	20.9%	24.2%
Portugal	82.0%	69.3%	68.0%	59.2%	67.2%	53.1%	48.0%	32.5%	37.7%	43.9%	42.5%	32.0%	14.4%	20.6%	25.9%	21.1%	16.2%	19.7%	14.4%	15.8%
Russian Federation	89.3%	68.8%	75.0%	68.6%	72.0%	82.7%	68.5%	33.8%	51.1%	40.9%	27.4%	47.4%	27.7%	51.8%	24.1%	41.2%	13.3%	20.4%	13.3%	21.2%
Spain	78.7%	76.3%	71.4%	67.5%	58.5%	64.5%	51.9%	41.2%	41.9%	41.2%	29.9%	34.7%	40.7%	41.7%	21.4%	33.0%	25.2%	25.7%	24.2%	8.9%
Sweden	70.1%	79.8%	61.4%	67.2%	63.8%	61.4%	49.2%	38.5%	42.1%	36.0%	32.6%	36.7%	35.2%	37.8%	21.4%	19.7%	22.4%	25.2%	24.3%	13.3%
Switzerland	79.5%	74.4%	72.6%	63.8%	67.0%	67.5%	51.4%	50.0%	48.3%	42.6%	40.8%	35.4%	37.3%	34.2%	22.3%	25.4%	23.8%	18.0%	16.6%	5.2%
Turkey	85.4%	68.6%	68.6%	58.1%	47.7%	54.1%	75.0%	35.4%	43.6%	47.7%	25.0%	35.5%	14.5%	29.1%	31.4%	10.4%	14.5%	14.5%	4.0%	18.6%
Uk	78.2%	70.5%	62.0%	62.5%	62.4%	55.2%	47.5%	37.3%	38.9%	32.1%	40.2%	30.4%	24.0%	26.2%	24.5%	20.7%	15.9%	16.3%	15.3%	15.7%
Other Europe	86.9%	83.5%	84.9%	59.3%	76.6%	71.7%	69.5%	58.0%	45.0%	42.5%	38.3%	48.2%	43.5%	38.0%	37.7%	16.6%	38.0%	20.3%	18.8%	30.9%
MIDDLE EAST	**87.8%**	**82.5%**	**56.0%**	**70.8%**	**43.2%**	**57.3%**	**48.9%**	**26.6%**	**48.1%**	**36.1%**	**32.5%**	**20.5%**	**19.4%**	**26.1%**	**6.3%**	**18.9%**	**9.6%**	**2.6%**	**4.1%**	**14.3%**
United Arab Emirates	90.1%	75.2%	44.2%	54.1%	41.7%	44.2%	43.8%	17.4%	27.3%	36.4%	34.3%	17.4%	17.4%	28.9%	9.9%	9.5%	9.9%	9.9%	9.9%	19.4%
Other Middle East	87.5%	83.5%	57.7%	73.1%	43.4%	59.1%	49.6%	27.9%	51.0%	36.0%	32.2%	20.9%	19.7%	25.7%	5.8%	20.2%	9.6%	1.6%	3.3%	13.6%
NORTH AMERICA	**76.7%**	**65.9%**	**70.9%**	**58.4%**	**62.1%**	**60.9%**	**55.5%**	**36.4%**	**36.8%**	**31.7%**	**23.9%**	**30.3%**	**25.7%**	**25.4%**	**25.2%**	**20.7%**	**11.0%**	**18.3%**	**16.0%**	**9.8%**
Canada	70.8%	65.0%	69.0%	50.9%	64.8%	56.5%	45.4%	31.0%	34.3%	34.1%	27.8%	28.5%	29.5%	28.5%	29.0%	17.1%	13.3%	21.2%	18.6%	13.2%
USA	78.3%	66.1%	71.4%	60.4%	61.3%	62.0%	58.3%	37.8%	37.4%	31.1%	22.8%	30.8%	24.6%	24.6%	24.2%	21.7%	10.3%	17.5%	15.3%	8.9%
Other North America	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
TOTAL	**79.3%**	**68.5%**	**63.9%**	**60.5%**	**57.5%**	**56.4%**	**52.2%**	**37.5%**	**36.3%**	**33.1%**	**32.8%**	**30.6%**	**26.5%**	**25.6%**	**22.2%**	**20.8%**	**15.9%**	**15.4%**	**15.3%**	**12.1%**

APPENDIX

	EASTERN CAPE TOP 20 ATTRACTIONS BY SOURCE MARKETS - Q4 2025																			
	Addo Elephant National Park	Storms River	Boardwalk Shopping Mall	Did not visit any	Bloukrans Bridge Bungy (Highest Bungee)	Walmer Park	Greenacres Mall	Tree Top Canopy Tour, Tsitsikamma Forest	Nelson Mandela Museum (Mthatha)	Steve Biko Monument and Museum and Grave Site - (King Williams Town, East London)	Wild Fly Fishing - Somerset East	Valley of Desolation / Owl House / Karoo / Museum	Nelson Mandela's Homestead / Gravesite (Qunu)	Tiffendel Ski Resort	Private Game Reserve	Hemmingways Mall	Amakhala Game Reserve	Pumba Game reserve	Baywest Mall	Kings Beach
AFRICA	**11.3%**	**4.7%**	**16.5%**	**60.2%**	**1.3%**	**8.7%**	**12.1%**	**3.8%**	**3.8%**	**5.1%**	**0.6%**	**1.8%**	**1.0%**	**0.9%**	**0.0%**	**3.2%**	**0.0%**	**0.0%**	**2.3%**	**4.6%**
Botswana	0.0%	0.0%	42.7%	57.3%	0.0%	0.0%	15.9%	15.9%	0.0%	15.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	15.9%
Lesotho	0.0%	0.0%	0.0%	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Malawi	0.0%	0.0%	58.1%	41.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	58.1%	0.0%
Mozambique	0.0%	0.0%	14.8%	85.2%	0.0%	0.0%	14.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Namibia	6.4%	6.4%	14.3%	66.6%	6.4%	20.7%	27.0%	6.4%	6.4%	6.4%	6.4%	6.4%	6.4%	6.4%	0.0%	0.0%	0.0%	0.0%	0.0%	6.4%
Eswatini	0.0%	0.0%	0.0%	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zambia	0.0%	0.0%	0.0%	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zimbabwe	20.3%	5.6%	9.2%	46.8%	0.0%	5.6%	9.2%	5.6%	5.6%	5.6%	0.0%	0.0%	0.0%	0.0%	0.0%	9.0%	0.0%	0.0%	0.0%	3.6%
Angola	0.0%	0.0%	52.6%	47.4%	0.0%	0.0%	52.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
DRC	0.0%	0.0%	18.9%	81.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Ethiopia	26.6%	0.0%	0.0%	73.4%	0.0%	26.6%	0.0%	0.0%	0.0%	26.6%	0.0%	0.0%	26.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Ghana	0.0%	0.0%	100.0%	0.0%	0.0%	48.2%	48.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	48.2%	0.0%
Kenya	0.0%	0.0%	24.7%	50.6%	0.0%	0.0%	24.7%	0.0%	0.0%	0.0%	0.0%	24.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	24.7%
Nigeria	0.0%	0.0%	7.1%	54.1%	0.0%	12.6%	19.2%	0.0%	0.0%	6.6%	0.0%	0.0%	0.0%	7.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tanzania	100.0%	0.0%	0.0%	0.0%	0.0%	100.0%	100.0%	0.0%	100.0%	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Uganda	35.6%	0.0%	0.0%	100.0%	35.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Africa	14.4%	17.5%	17.5%	65.9%	0.0%	17.5%	2.3%	0.0%	4.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.7%
ASIA	**26.4%**	**15.3%**	**20.7%**	**47.8%**	**8.0%**	**19.5%**	**27.1%**	**2.8%**	**13.3%**	**7.9%**	**6.9%**	**6.9%**	**1.8%**	**1.3%**	**0.0%**	**2.8%**	**0.5%**	**3.7%**	**0.5%**	**0.0%**
China including Hong Kong	25.4%	20.9%	26.8%	45.4%	12.8%	29.2%	31.9%	6.5%	10.1%	10.1%	13.7%	6.5%	9.2%	6.5%	0.0%	2.7%	2.7%	0.0%	2.7%	0.0%
India	31.4%	19.2%	5.6%	52.9%	10.1%	11.2%	31.4%	5.6%	4.5%	0.0%	5.6%	4.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Japan	0.0%	48.0%	100.0%	0.0%	0.0%	52.0%	52.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Malaysia	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Singapore	100.0%	0.0%	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	100.0%	0.0%	0.0%
South Korea	35.3%	0.0%	0.0%	32.4%	0.0%	35.3%	35.3%	0.0%	0.0%	0.0%	0.0%	35.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Asia	18.0%	10.6%	17.1%	55.1%	6.5%	17.8%	21.5%	0.0%	15.4%	14.2%	6.5%	6.5%	0.0%	0.0%	0.0%	5.4%	0.0%	0.0%	0.0%	0.0%
AUSTRALASIA	**51.2%**	**35.7%**	**21.7%**	**12.3%**	**16.9%**	**21.9%**	**19.2%**	**8.1%**	**0.0%**	**0.0%**	**5.1%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**7.3%**	**2.2%**	**0.0%**	**3.7%**	**1.4%**
Australia	54.1%	34.5%	23.8%	12.0%	17.9%	15.4%	15.3%	10.2%	0.0%	0.0%	6.4%	0.0%	0.0%	0.0%	0.0%	4.1%	2.8%	0.0%	4.6%	0.0%
New Zealand	40.4%	40.4%	13.8%	13.3%	13.3%	46.8%	34.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	19.7%	0.0%	0.0%	0.0%	6.9%
Other Australia	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
CENTRAL & SOUTH AMERICA	**28.7%**	**71.7%**	**33.8%**	**1.5%**	**20.4%**	**29.9%**	**5.5%**	**4.3%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**6.9%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**
Argentina	67.6%	67.6%	0.0%	0.0%	32.4%	0.0%	35.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Brazil	28.7%	70.5%	39.6%	0.0%	20.2%	30.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	9.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Chile	34.4%	0.0%	0.0%	65.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Central & South America	21.8%	84.8%	21.8%	0.0%	21.8%	37.0%	21.8%	21.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
EUROPE	**66.7%**	**39.8%**	**23.8%**	**13.2%**	**27.1%**	**16.3%**	**14.0%**	**13.6%**	**10.3%**	**8.8%**	**7.0%**	**6.6%**	**4.0%**	**4.4%**	**2.2%**	**0.7%**	**1.8%**	**1.0%**	**0.4%**	**0.0%**
Austria	76.8%	73.5%	0.0%	12.2%	25.2%	14.3%	14.3%	14.3%	10.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	10.9%	0.0%	0.0%	0.0%
Belgium	65.4%	37.8%	22.1%	18.9%	28.2%	6.1%	12.8%	9.6%	9.6%	12.5%	3.2%	3.2%	9.6%	0.0%	0.0%	0.0%	3.2%	3.2%	0.0%	0.0%
Denmark	64.1%	36.8%	27.1%	26.8%	36.8%	28.0%	0.0%	18.0%	28.5%	18.8%	18.3%	18.0%	0.0%	18.3%	0.0%	0.0%	0.0%	8.8%	0.0%	0.0%
Finland	77.4%	59.1%	59.1%	22.6%	40.9%	22.6%	18.3%	0.0%	18.3%	0.0%	22.6%	22.6%	22.6%	22.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
France	67.9%	45.5%	15.0%	17.4%	27.5%	19.5%	12.4%	16.5%	15.5%	6.8%	10.5%	6.4%	2.1%	5.2%	0.0%	2.1%	0.0%	0.0%	0.0%	0.0%
Germany	75.3%	43.9%	21.0%	11.3%	24.0%	11.4%	10.4%	14.2%	8.2%	6.2%	3.2%	5.1%	2.8%	5.8%	4.0%	0.0%	0.9%	0.0%	0.7%	0.0%
Ireland	56.2%	42.2%	12.4%	12.4%	42.2%	26.5%	12.4%	12.4%	29.7%	12.4%	12.4%	12.4%	0.0%	12.4%	0.0%	0.0%	14.0%	0.0%	0.0%	0.0%
Italy	48.6%	36.8%	20.2%	27.8%	11.8%	0.0%	15.6%	4.0%	15.8%	4.0%	7.9%	3.9%	11.9%	0.0%	0.0%	0.0%	0.0%	0.0%	4.0%	0.0%
The Netherlands	66.4%	39.6%	22.3%	9.6%	28.3%	12.6%	17.6%	15.9%	7.8%	3.2%	4.7%	3.2%	3.1%	1.5%	1.5%	0.0%	1.5%	0.0%	0.0%	0.0%
Norway	86.7%	39.9%	51.1%	0.0%	37.8%	0.0%	26.6%	24.5%	0.0%	11.2%	0.0%	11.2%	0.0%	0.0%	0.0%	0.0%	13.3%	13.3%	0.0%	0.0%
Portugal	42.1%	41.9%	21.2%	24.6%	30.0%	17.7%	29.8%	8.8%	8.8%	8.8%	8.8%	8.8%	8.8%	0.0%	0.0%	8.8%	0.0%	0.0%	0.0%	0.0%
Russian Federation	59.8%	40.2%	59.8%	0.0%	39.1%	41.3%	40.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	19.6%	0.0%	0.0%	0.0%	0.0%	0.0%
Spain	49.7%	26.2%	9.1%	32.1%	9.1%	9.1%	17.1%	0.0%	18.1%	18.1%	0.0%	15.5%	9.1%	8.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sweden	82.5%	47.8%	46.3%	0.0%	44.5%	27.0%	9.2%	16.0%	8.7%	17.9%	8.7%	8.7%	4.6%	8.3%	6.8%	0.0%	0.0%	0.0%	0.0%	0.0%
Switzerland	70.6%	39.3%	20.4%	4.7%	39.7%	19.2%	4.7%	14.2%	10.2%	0.0%	15.2%	10.2%	5.6%	4.9%	4.7%	0.0%	0.0%	0.0%	0.0%	0.0%
Turkey	100.0%	0.0%	62.1%	0.0%	24.2%	0.0%	37.9%	37.9%	37.9%	100.0%	37.9%	24.2%	0.0%	62.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Uk	57.4%	31.3%	26.2%	15.1%	26.0%	20.6%	13.3%	14.3%	8.6%	9.9%	11.1%	9.3%	4.9%	2.7%	0.6%	1.9%	3.0%	2.5%	0.6%	0.0%
Other Europe	66.8%	47.1%	24.2%	13.6%	25.9%	31.1%	27.5%	11.0%	14.5%	22.7%	2.6%	1.2%	1.5%	2.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
MIDDLE EAST	**47.2%**	**34.6%**	**19.2%**	**21.7%**	**0.0%**	**5.4%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**
United Arab Emirates	26.4%	26.4%	0.0%	20.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Middle East	53.2%	36.9%	24.8%	22.0%	0.0%	7.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
NORTH AMERICA	**55.9%**	**27.0%**	**21.1%**	**20.8%**	**17.7%**	**11.9%**	**16.4%**	**16.1%**	**10.3%**	**3.6%**	**4.7%**	**6.9%**	**7.4%**	**0.0%**	**1.9%**	**0.0%**	**0.0%**	**1.7%**	**0.8%**	**0.0%**
Canada	78.8%	30.7%	19.1%	7.2%	22.5%	11.0%	11.3%	26.6%	18.8%	3.4%	7.6%	15.1%	7.6%	0.0%	3.4%	0.0%	0.0%	0.0%	0.0%	0.0%
USA	47.6%	25.7%	21.8%	25.7%	15.9%	12.2%	18.3%	12.3%	7.2%	3.7%	3.7%	4.0%	7.4%	0.0%	1.3%	0.0%	0.0%	2.4%	1.1%	0.0%
Other North America	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
TOTAL	**54.2%**	**33.1%**	**22.5%**	**21.7%**	**20.8%**	**15.4%**	**14.4%**	**11.4%**	**8.6%**	**6.9%**	**5.5%**	**5.4%**	**3.5%**	**3.1%**	**1.6%**	**1.4%**	**1.3%**	**1.0%**	**0.9%**	**0.7%**

APPENDIX

	KwaZULU-NATAL TOP 20 ATTRACTIONS BY SOURCE MARKETS - Q4 2025																			
	Durban North Coast (Umhlanga, Umdloti, Ballito, Zimbali, Salt Rock, Shaka's Rock)	Gateway Mall	Durban North Beach	Drakensberg Mountains	Did not visit any	Drakensberg Gardens / Sani Pass / Amphitheatre / Cathedral Peak	Elephant Coast (e.g. iSimangaliso Wetland Park World Heritage Site, Ndumu, Phinda)	Durban South Beach	uShaka Marine World	La Lucia	Pietermaritzburg and Midlands (Midlands Meander, Mooi River, Nottingham Road, Howick etc.)	iSimangaliso Wetland Park	Pavilion Mall	Florida Road (Durban)	Zululand cultural villages (Ric BayNongoma)	South Coast Beach Resorts and attractions (Amanzimtoti, Port Shepstone, Scottbu,	Royal Natal National Park	Moses Mabhida Stadium	Valley of 1000 Hills (Phezulu, Krantzkloof Nature Reserve)	Sodwana Bay
AFRICA	**20.2%**	**21.7%**	**11.1%**	**2.5%**	**52.2%**	**1.1%**	**0.7%**	**10.8%**	**14.2%**	**2.0%**	**1.3%**	**1.6%**	**10.2%**	**4.7%**	**1.2%**	**0.6%**	**0.0%**	**3.0%**	**1.3%**	**1.0%**
Botswana	9.4%	9.4%	13.8%	6.9%	42.8%	0.0%	0.0%	22.5%	25.3%	0.0%	6.9%	0.0%	6.9%	4.7%	4.7%	0.0%	0.0%	16.2%	4.7%	0.0%
Lesotho	0.0%	50.0%	50.0%	0.0%	50.0%	0.0%	0.0%	0.0%	50.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Malawi	18.8%	44.9%	18.8%	0.0%	36.3%	0.0%	0.0%	37.6%	0.0%	0.0%	0.0%	0.0%	0.0%	18.8%	0.0%	0.0%	0.0%	18.8%	0.0%	0.0%
Mozambique	50.2%	42.2%	20.5%	0.0%	46.2%	0.0%	0.0%	4.4%	22.7%	0.0%	0.0%	0.0%	30.6%	26.7%	0.0%	3.6%	0.0%	0.0%	0.0%	0.0%
Namibia	0.0%	6.1%	0.0%	0.0%	70.9%	0.0%	0.0%	7.6%	0.0%	0.0%	0.0%	7.6%	0.0%	0.0%	7.6%	0.0%	0.0%	0.0%	0.0%	7.6%
Eswatini	0.0%	0.0%	0.0%	0.0%	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zambia	13.1%	18.9%	12.4%	0.0%	45.1%	0.0%	0.0%	8.3%	8.3%	13.1%	0.0%	13.1%	0.0%	0.0%	4.1%	0.0%	0.0%	0.0%	0.0%	0.0%
Zimbabwe	19.8%	18.8%	6.5%	1.9%	59.0%	1.9%	0.0%	5.5%	15.2%	0.0%	0.0%	0.0%	12.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Angola	50.8%	50.8%	0.0%	0.0%	30.4%	0.0%	0.0%	16.9%	15.2%	0.0%	0.0%	0.0%	35.6%	34.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
DRC	15.4%	0.0%	15.4%	0.0%	69.1%	0.0%	0.0%	0.0%	15.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Ethiopia	20.4%	41.8%	41.8%	21.4%	42.8%	0.0%	0.0%	36.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Ghana	0.0%	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	46.8%	53.2%	53.2%	0.0%	0.0%	0.0%	46.8%	0.0%	0.0%	0.0%	46.8%	0.0%	0.0%
Kenya	33.3%	34.1%	16.7%	0.0%	33.4%	0.0%	0.0%	16.3%	8.7%	0.0%	0.0%	0.0%	16.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	8.7%
Nigeria	34.0%	16.2%	16.8%	4.1%	50.2%	0.0%	0.0%	17.1%	16.8%	4.5%	7.9%	0.0%	8.2%	8.2%	0.0%	0.0%	0.0%	8.9%	0.0%	0.0%
Tanzania	0.0%	36.1%	0.0%	0.0%	36.4%	0.0%	0.0%	0.0%	17.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	27.5%	0.0%
Uganda	0.0%	23.8%	0.0%	0.0%	76.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Africa	22.4%	13.6%	17.4%	11.5%	43.2%	5.1%	8.5%	21.4%	13.0%	0.8%	5.1%	0.5%	9.4%	4.6%	0.0%	4.0%	0.0%	4.6%	5.1%	0.0%
ASIA	**33.7%**	**45.1%**	**31.1%**	**13.5%**	**11.2%**	**13.2%**	**6.8%**	**32.2%**	**27.7%**	**5.7%**	**16.9%**	**2.0%**	**16.2%**	**8.8%**	**5.6%**	**5.2%**	**2.1%**	**4.1%**	**0.5%**	**2.3%**
China including Hong Kong	39.2%	44.5%	52.7%	3.4%	28.2%	6.5%	6.5%	17.5%	29.2%	8.9%	0.0%	3.4%	25.2%	11.8%	3.4%	6.3%	3.4%	3.4%	3.4%	3.4%
India	46.2%	53.0%	34.8%	18.5%	7.5%	13.0%	7.9%	19.8%	38.8%	3.5%	15.0%	3.2%	19.4%	9.1%	9.1%	7.5%	3.5%	3.2%	0.0%	0.0%
Japan	35.7%	45.5%	45.5%	14.3%	0.0%	24.2%	24.2%	55.3%	25.0%	9.8%	0.0%	0.0%	10.7%	10.7%	9.8%	0.0%	0.0%	0.0%	0.0%	9.8%
Malaysia	0.0%	61.8%	0.0%	61.8%	0.0%	61.8%	0.0%	38.2%	38.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	38.2%	0.0%	0.0%
Singapore	0.0%	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
South Korea	13.4%	37.3%	13.4%	0.0%	38.7%	0.0%	0.0%	25.4%	13.4%	13.4%	0.0%	0.0%	12.0%	13.4%	0.0%	0.0%	0.0%	12.0%	0.0%	12.0%
Other Asia	13.6%	16.6%	13.6%	5.6%	5.4%	11.6%	0.0%	71.8%	5.6%	5.6%	57.8%	0.0%	10.1%	5.6%	0.0%	4.5%	0.0%	0.0%	0.0%	0.0%
AUSTRALASIA	**41.8%**	**27.7%**	**33.3%**	**23.9%**	**9.4%**	**13.8%**	**29.2%**	**14.4%**	**12.1%**	**12.4%**	**19.6%**	**10.3%**	**17.7%**	**5.4%**	**5.1%**	**2.9%**	**5.1%**	**0.0%**	**2.4%**	**2.9%**
Australia	37.4%	25.4%	34.0%	23.2%	10.7%	13.9%	27.1%	12.3%	11.8%	14.2%	20.3%	11.8%	18.2%	6.2%	5.8%	3.4%	5.8%	0.0%	2.8%	3.4%
New Zealand	71.6%	43.2%	28.4%	28.4%	0.0%	13.6%	43.2%	28.4%	14.8%	0.0%	14.8%	0.0%	14.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Australia	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
CENTRAL & SOUTH AMERICA	**43.4%**	**12.4%**	**27.9%**	**21.3%**	**10.5%**	**15.5%**	**16.4%**	**10.2%**	**27.9%**	**0.0%**	**15.5%**	**15.4%**	**12.4%**	**29.0%**	**0.0%**	**15.5%**	**15.5%**	**0.0%**	**15.5%**	**0.2%**
Argentina	50.0%	0.0%	0.0%	25.0%	50.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Brazil	71.3%	23.1%	51.8%	28.7%	0.0%	28.7%	0.0%	0.0%	51.8%	0.0%	28.7%	25.1%	23.1%	53.8%	0.0%	28.7%	28.7%	0.0%	28.7%	0.0%
Chile	0.0%	0.0%	0.0%	63.4%	0.0%	0.0%	26.7%	0.0%	0.0%	0.0%	0.0%	36.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Central & South America	0.0%	0.0%	0.0%	0.0%	17.7%	0.0%	48.5%	33.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%
EUROPE	**32.5%**	**27.0%**	**30.3%**	**34.8%**	**10.1%**	**30.8%**	**27.0%**	**19.3%**	**14.4%**	**19.4%**	**17.1%**	**16.1%**	**9.3%**	**7.6%**	**7.8%**	**7.9%**	**7.4%**	**4.1%**	**4.6%**	**5.1%**
Austria	16.4%	24.2%	16.4%	16.4%	8.7%	25.6%	55.5%	16.4%	7.8%	17.9%	10.1%	10.1%	0.0%	0.0%	10.1%	0.0%	10.1%	0.0%	0.0%	0.0%
Belgium	22.6%	22.1%	18.0%	41.5%	4.6%	31.8%	41.0%	26.7%	13.4%	36.0%	8.8%	13.4%	0.0%	18.0%	4.6%	18.0%	13.4%	4.6%	8.8%	9.2%
Denmark	43.8%	14.3%	14.3%	42.4%	28.1%	43.8%	28.6%	14.3%	14.3%	14.3%	42.9%	14.3%	14.3%	14.3%	14.3%	29.5%	28.6%	14.3%	0.0%	14.3%
Finland	43.4%	0.0%	43.4%	0.0%	56.6%	43.4%	0.0%	0.0%	0.0%	43.4%	43.4%	43.4%	0.0%	0.0%	0.0%	43.4%	0.0%	0.0%	0.0%	43.4%
France	23.4%	16.1%	18.8%	36.6%	12.6%	40.3%	22.6%	18.4%	8.9%	24.0%	12.6%	14.6%	6.0%	0.0%	10.8%	6.3%	12.5%	3.3%	3.2%	2.8%
Germany	30.2%	26.4%	35.9%	45.7%	7.1%	38.2%	32.5%	21.3%	20.9%	24.8%	17.1%	24.2%	13.6%	7.4%	8.0%	11.2%	6.4%	3.1%	5.3%	6.4%
Ireland	36.8%	36.8%	38.8%	16.9%	10.4%	0.0%	17.9%	18.9%	17.9%	0.0%	8.5%	7.5%	17.9%	0.0%	8.5%	0.0%	0.0%	0.0%	8.5%	0.0%
Italy	23.5%	16.1%	7.4%	7.4%	37.2%	16.0%	7.4%	7.4%	8.6%	7.4%	16.0%	7.4%	0.0%	8.6%	0.0%	0.0%	0.0%	8.6%	0.0%	0.0%
The Netherlands	37.7%	21.0%	19.1%	45.4%	6.2%	33.1%	33.1%	23.1%	8.3%	18.8%	27.1%	22.7%	8.3%	6.2%	10.6%	2.0%	8.2%	4.2%	6.2%	4.2%
Norway	0.0%	18.6%	40.7%	18.6%	18.6%	0.0%	0.0%	40.7%	0.0%	0.0%	22.1%	0.0%	0.0%	18.6%	0.0%	0.0%	22.1%	0.0%	0.0%	0.0%
Portugal	0.0%	17.3%	35.0%	17.3%	17.7%	34.7%	12.7%	17.3%	0.0%	34.7%	17.3%	17.3%	17.3%	17.3%	0.0%	17.3%	0.0%	0.0%	0.0%	0.0%
Russian Federation	49.6%	50.4%	50.4%	16.6%	33.8%	16.6%	15.7%	0.0%	15.7%	16.6%	18.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	15.7%	0.0%	15.7%
Spain	68.0%	27.7%	29.6%	28.3%	0.0%	39.0%	29.0%	30.8%	27.7%	21.4%	20.1%	32.0%	18.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sweden	52.0%	33.3%	80.4%	82.2%	0.0%	37.4%	52.0%	48.0%	0.0%	28.5%	28.5%	61.8%	9.8%	0.0%	17.8%	24.4%	18.7%	9.8%	23.5%	27.6%
Switzerland	56.7%	19.8%	49.8%	43.0%	0.0%	62.7%	44.5%	0.0%	0.0%	24.3%	24.3%	30.4%	0.0%	0.0%	6.1%	12.9%	19.8%	0.0%	11.8%	6.1%
Turkey	0.0%	27.9%	44.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Uk	33.2%	35.2%	33.8%	19.0%	11.5%	17.5%	11.8%	17.1%	19.2%	10.2%	14.4%	4.7%	11.4%	15.1%	8.2%	6.6%	4.7%	4.4%	3.2%	3.9%
Other Europe	36.1%	29.2%	9.2%	54.0%	8.0%	38.3%	53.8%	28.1%	1.4%	24.1%	23.1%	12.7%	7.7%	7.7%	2.7%	9.0%	1.4%	7.7%	1.4%	0.0%
MIDDLE EAST	**13.0%**	**0.0%**	**5.2%**	**17.5%**	**31.4%**	**6.3%**	**13.0%**	**15.3%**	**5.9%**	**6.3%**	**2.5%**	**0.0%**	**0.0%**	**0.0%**	**6.7%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**
United Arab Emirates	27.7%	0.0%	21.7%	21.7%	50.6%	0.0%	27.7%	21.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	27.7%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Middle East	8.3%	0.0%	0.0%	16.1%	25.4%	8.3%	8.3%	13.3%	7.8%	8.3%	3.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
NORTH AMERICA	**45.9%**	**29.0%**	**25.4%**	**22.3%**	**9.7%**	**23.7%**	**22.7%**	**20.8%**	**17.0%**	**18.7%**	**14.6%**	**10.5%**	**10.1%**	**12.2%**	**13.0%**	**11.0%**	**6.2%**	**7.8%**	**3.5%**	**2.5%**
Canada	36.2%	26.6%	31.1%	26.9%	7.1%	19.7%	20.6%	20.9%	3.3%	23.7%	16.5%	16.8%	3.3%	6.6%	23.9%	6.5%	10.4%	10.2%	6.6%	0.0%
USA	49.6%	29.9%	23.2%	20.5%	10.7%	25.3%	23.5%	20.8%	22.4%	16.7%	13.9%	8.0%	12.8%	14.4%	8.8%	12.8%	4.5%	6.8%	2.3%	3.5%
Other North America	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
TOTAL	**31.1%**	**26.5%**	**24.6%**	**22.9%**	**21.4%**	**20.1%**	**18.2%**	**17.6%**	**15.5%**	**13.3%**	**12.6%**	**10.5%**	**10.3%**	**7.6%**	**6.3%**	**6.0%**	**5.0%**	**4.0%**	**3.4%**	**3.4%**

APPENDIX

MPUMALANGA TOP 20 ATTRACTIONS BY SOURCE MARKETS - Q4 2025	Kruger Park via Skukuza, Numbi, Malelane, Crocodile Bridge	Blyde River Canyon / God's Window	Bourke's Luck Potholes	Panorama Route	Hazyview (Cable slide, Hot air ballooning, Abseiling, Elephant drives, etc.)	Three Rondavels	Pilgrim's Rest	Sabie	Hazyview Mall	White river	Did not visit any	Dullstroom fly fishing	Sabi Sands Game Reserve	Nelspruit Botanical Gardens	The Pinnacle	Crocriver Enviro Park	Sabi Sabi Game Reserve	Mala Mala Game Reserve	Lydenburg (Voortrekker graves, Mapoch's caves, Gustav Reserve etc.)	Sadwala Caves
AFRICA	**15.5%**	**8.3%**	**5.6%**	**3.9%**	**3.3%**	**7.6%**	**0.0%**	**1.7%**	**2.7%**	**1.7%**	**69.8%**	**0.0%**	**0.0%**	**2.2%**	**0.0%**	**0.0%**	**0.9%**	**0.5%**	**0.3%**	**0.0%**
Botswana	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lesotho	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Malawi	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mozambique	15.6%	14.1%	0.0%	0.0%	0.0%	14.1%	0.0%	0.0%	0.0%	0.0%	70.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Namibia	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	73.1%	0.0%	0.0%	12.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Eswatini	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zambia	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	89.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zimbabwe	4.4%	6.7%	6.7%	6.7%	4.4%	6.7%	0.0%	0.0%	4.2%	4.2%	84.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Angola	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	30.9%	0.0%	38.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	30.9%	0.0%	0.0%
DRC	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Ethiopia	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Ghana	46.8%	100.0%	100.0%	0.0%	0.0%	53.2%	0.0%	46.8%	0.0%	0.0%	0.0%	0.0%	0.0%	46.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Kenya	65.0%	0.0%	0.0%	0.0%	31.5%	31.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Nigeria	17.6%	8.4%	0.0%	8.4%	0.0%	8.4%	0.0%	9.9%	0.0%	0.0%	63.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	9.2%	0.0%
Tanzania	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Uganda	47.5%	47.5%	0.0%	47.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	52.5%	0.0%	0.0%	0.0%
Other Africa	66.8%	7.3%	0.1%	0.1%	0.0%	7.1%	0.1%	0.0%	7.1%	0.0%	24.3%	0.0%	0.0%	0.1%	0.1%	0.1%	0.0%	0.0%	0.0%	0.0%
ASIA	**68.4%**	**30.5%**	**12.0%**	**15.4%**	**14.0%**	**10.1%**	**4.3%**	**10.6%**	**8.7%**	**10.1%**	**16.3%**	**2.2%**	**4.5%**	**7.4%**	**0.9%**	**3.6%**	**3.1%**	**3.2%**	**7.6%**	**1.8%**
China including Hong Kong	74.0%	38.2%	19.9%	18.3%	33.5%	33.5%	16.1%	17.9%	6.1%	20.3%	6.1%	5.7%	17.5%	11.8%	5.7%	12.2%	11.4%	8.5%	21.8%	0.0%
India	70.5%	26.3%	10.5%	15.7%	5.3%	10.5%	5.3%	9.5%	9.5%	14.8%	14.7%	0.0%	5.3%	5.2%	0.0%	0.0%	0.0%	5.3%	0.0%	0.0%
Japan	46.0%	46.8%	14.7%	10.1%	0.0%	0.0%	0.0%	10.1%	0.0%	10.1%	32.9%	0.0%	0.0%	21.1%	0.0%	10.1%	0.0%	0.0%	0.0%	10.1%
Malaysia	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Singapore	100.0%	21.2%	0.0%	19.1%	21.2%	0.0%	0.0%	0.0%	21.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	21.2%	0.0%
South Korea	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Asia	36.9%	29.1%	29.1%	14.5%	29.1%	14.5%	0.0%	29.1%	0.0%	0.0%	27.3%	14.5%	0.0%	0.0%	0.0%	0.0%	14.5%	0.0%	0.0%	0.0%
AUSTRALASIA	**90.9%**	**38.8%**	**22.8%**	**14.6%**	**14.2%**	**18.5%**	**8.1%**	**11.6%**	**12.0%**	**7.4%**	**2.7%**	**1.0%**	**3.1%**	**2.4%**	**2.6%**	**1.4%**	**6.2%**	**0.8%**	**0.0%**	**1.2%**
Australia	93.6%	42.5%	23.2%	14.8%	13.3%	20.2%	9.3%	13.3%	11.8%	5.4%	1.2%	1.2%	2.7%	2.8%	2.9%	1.6%	5.2%	0.0%	0.0%	1.3%
New Zealand	73.4%	13.8%	20.2%	13.3%	20.2%	6.9%	0.0%	0.0%	13.3%	20.2%	13.3%	0.0%	6.4%	0.0%	0.0%	0.0%	13.3%	6.4%	0.0%	0.0%
Other Australia	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
CENTRAL & SOUTH AMERICA	**99.0%**	**28.4%**	**10.2%**	**23.6%**	**3.7%**	**8.7%**	**3.6%**	**7.4%**	**0.9%**	**6.4%**	**0.4%**	**0.0%**	**0.0%**	**2.9%**	**0.4%**	**0.0%**	**0.3%**	**0.0%**	**0.0%**	**3.1%**
Argentina	93.0%	45.4%	23.7%	14.8%	6.4%	0.0%	7.0%	8.3%	13.4%	14.0%	7.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	7.0%
Brazil	100.0%	27.5%	10.0%	23.6%	3.3%	10.0%	3.3%	7.0%	0.0%	7.0%	0.0%	0.0%	0.0%	3.6%	0.0%	0.0%	0.0%	0.0%	0.0%	3.3%
Chile	100.0%	82.6%	41.3%	65.1%	0.0%	41.3%	0.0%	17.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	23.9%	0.0%	17.4%	0.0%	0.0%	0.0%
Other Central & South America	95.2%	17.5%	0.0%	21.8%	4.8%	0.0%	4.4%	8.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
EUROPE	**92.7%**	**61.6%**	**32.4%**	**29.5%**	**27.3%**	**23.3%**	**16.9%**	**13.7%**	**12.5%**	**11.2%**	**1.8%**	**9.3%**	**8.8%**	**8.1%**	**6.8%**	**6.5%**	**5.5%**	**5.5%**	**5.0%**	**4.2%**
Austria	100.0%	39.6%	18.9%	23.0%	22.5%	30.8%	13.4%	13.4%	4.1%	4.1%	0.0%	4.1%	15.0%	0.0%	8.8%	8.8%	0.0%	0.0%	4.1%	13.4%
Belgium	89.0%	74.8%	43.9%	58.1%	24.7%	44.5%	22.4%	22.4%	8.2%	16.4%	0.0%	5.7%	5.7%	13.9%	14.1%	7.9%	5.4%	5.7%	2.8%	0.0%
Denmark	95.0%	66.7%	23.5%	23.8%	23.4%	13.9%	23.6%	13.7%	19.0%	9.6%	0.0%	5.0%	14.3%	14.6%	14.9%	0.0%	4.7%	0.0%	9.4%	9.5%
Finland	92.0%	71.2%	53.4%	0.0%	40.5%	9.8%	0.0%	0.0%	30.7%	0.0%	0.0%	38.6%	9.8%	30.7%	0.0%	0.0%	30.7%	8.0%	0.0%	0.0%
France	96.1%	73.2%	29.0%	28.3%	24.6%	19.2%	20.7%	15.8%	8.0%	9.8%	1.4%	6.4%	7.6%	11.7%	6.2%	9.3%	7.6%	5.2%	3.6%	4.3%
Germany	93.5%	64.5%	35.2%	28.1%	25.7%	25.6%	12.3%	12.2%	13.4%	11.5%	1.3%	12.5%	9.5%	8.6%	6.7%	7.2%	3.3%	8.0%	3.5%	3.2%
Ireland	93.4%	59.6%	31.6%	27.2%	14.0%	26.5%	26.5%	0.0%	11.7%	6.6%	0.0%	0.0%	6.6%	20.6%	5.9%	0.0%	0.0%	5.9%	5.9%	6.6%
Italy	97.4%	69.0%	33.5%	39.3%	26.0%	15.5%	21.3%	7.9%	10.5%	8.3%	0.0%	2.9%	7.6%	2.6%	10.5%	5.1%	0.0%	0.0%	5.1%	5.4%
The Netherlands	93.0%	62.5%	29.8%	35.5%	34.7%	25.7%	19.0%	18.8%	9.9%	18.9%	0.0%	5.8%	5.8%	8.9%	9.0%	6.9%	4.9%	2.9%	7.0%	5.9%
Norway	100.0%	48.5%	40.2%	8.3%	55.5%	23.6%	15.3%	8.3%	38.9%	8.3%	0.0%	8.3%	16.6%	8.3%	0.0%	0.0%	8.3%	0.0%	24.9%	8.3%
Portugal	83.2%	45.8%	16.7%	29.0%	12.5%	23.0%	12.2%	4.5%	12.5%	6.1%	10.6%	0.0%	4.5%	0.0%	0.0%	6.2%	12.4%	0.0%	16.8%	16.8%
Russian Federation	80.1%	81.2%	41.5%	80.1%	41.5%	19.9%	41.5%	21.6%	0.0%	0.0%	0.0%	19.9%	0.0%	19.9%	0.0%	19.9%	0.0%	19.9%	0.0%	0.0%
Spain	92.6%	57.9%	23.6%	40.6%	24.0%	17.0%	13.3%	6.8%	10.1%	6.8%	3.7%	3.1%	3.7%	3.3%	3.7%	0.0%	10.7%	6.3%	3.7%	0.0%
Sweden	95.8%	59.7%	18.6%	36.4%	24.4%	29.0%	11.6%	7.0%	11.2%	8.9%	4.2%	7.0%	4.2%	7.0%	4.2%	7.0%	11.6%	0.0%	0.0%	0.0%
Switzerland	90.8%	50.9%	34.3%	27.0%	34.2%	27.5%	20.0%	6.9%	23.5%	16.1%	0.0%	12.2%	20.6%	2.5%	9.1%	2.2%	6.9%	4.8%	6.9%	4.5%
Turkey	100.0%	100.0%	32.7%	0.0%	74.4%	58.1%	0.0%	0.0%	32.5%	0.0%	0.0%	16.2%	32.5%	16.3%	16.2%	41.8%	0.0%	0.0%	58.1%	0.0%
Uk	86.7%	43.0%	30.1%	15.8%	23.6%	14.6%	10.0%	13.7%	13.4%	6.7%	5.3%	10.8%	8.9%	3.7%	2.4%	2.9%	9.6%	7.3%	5.4%	2.4%
Other Europe	90.8%	63.7%	47.8%	36.2%	31.7%	17.7%	41.6%	31.9%	15.3%	22.2%	5.4%	13.7%	1.0%	0.0%	11.6%	10.0%	0.0%	0.0%	1.0%	9.9%
MIDDLE EAST	**74.6%**	**52.1%**	**46.6%**	**29.7%**	**40.7%**	**16.9%**	**25.8%**	**5.9%**	**29.7%**	**0.0%**	**5.5%**	**0.0%**	**5.5%**	**0.0%**	**5.9%**	**0.0%**	**29.7%**	**0.0%**	**11.4%**	**0.0%**
United Arab Emirates	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Middle East	74.6%	52.1%	46.6%	29.7%	40.7%	16.9%	25.8%	5.9%	29.7%	0.0%	5.5%	0.0%	5.5%	0.0%	5.9%	0.0%	29.7%	0.0%	11.4%	0.0%
NORTH AMERICA	**86.6%**	**57.2%**	**26.1%**	**24.1%**	**26.4%**	**13.0%**	**15.0%**	**12.1%**	**12.8%**	**10.0%**	**4.0%**	**7.0%**	**6.5%**	**5.8%**	**7.1%**	**6.9%**	**5.8%**	**5.0%**	**5.5%**	**4.1%**
Canada	95.7%	60.3%	19.8%	8.9%	8.3%	6.8%	2.2%	4.5%	11.0%	2.3%	0.0%	1.9%	2.3%	4.3%	2.3%	0.0%	4.5%	1.9%	6.6%	0.0%
USA	84.4%	56.4%	27.6%	27.7%	30.7%	14.5%	18.1%	14.0%	13.2%	11.9%	5.0%	8.2%	7.4%	6.2%	8.2%	8.5%	6.1%	5.8%	5.3%	5.0%
Other North America	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
TOTAL	**85.8%**	**53.6%**	**27.5%**	**25.4%**	**23.4%**	**19.1%**	**14.0%**	**12.1%**	**11.3%**	**9.8%**	**7.2%**	**7.1%**	**6.9%**	**6.7%**	**5.7%**	**5.4%**	**5.1%**	**4.5%**	**4.4%**	**3.6%**

APPENDIX

	LIMPOPO TOP 20 ATTRACTIONS BY SOURCE MARKETS - Q4 2025																			
	Kruger National Park via Orpen, Phalaborwa, Punda Maria	Mapungubwe National Park	Bela Bela Conservancy	Did not visit any	Nandoni Dam	Mapungubwe Cultural Landscape	The Chuene Resort	Ga (modjadji) / Motjaji	Timbavati Game Reserve	Names of Resorts/Safari	Mall of the North	Soutpansberg Mountains	Kapama Game Reserve	Private Game Reserves	Welgevanden Game Reserve	Mabula Game Reserve	Mabalingwe Nature Reserve	Not applicable	Polokwane Game Reserve	Sebatana Private Reserve
AFRICA	**16.1%**	**6.7%**	**16.5%**	**40.4%**	**0.0%**	**0.0%**	**0.0%**	**1.8%**	**0.0%**	**0.0%**	**13.3%**	**2.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**
Botswana	33.3%	33.3%	0.0%	33.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lesotho	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Malawi	0.0%	0.0%	0.0%	40.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mozambique	50.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	50.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Namibia	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Eswatini	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zambia	0.0%	0.0%	0.0%	51.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	48.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zimbabwe	12.5%	0.0%	24.4%	50.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	12.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Angola	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
DRC	0.0%	0.0%	0.0%	32.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	67.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Ethiopia	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Ghana	0.0%	33.3%	33.3%	33.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Kenya	24.7%	0.0%	24.7%	25.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	24.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Nigeria	31.5%	0.0%	31.5%	68.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tanzania	0.0%	0.0%	0.0%	50.4%	0.0%	0.0%	0.0%	49.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Uganda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Africa	36.9%	0.0%	19.4%	63.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
ASIA	**33.2%**	**2.3%**	**27.1%**	**11.3%**	**27.7%**	**2.3%**	**5.1%**	**2.3%**	**0.0%**	**0.0%**	**3.8%**	**2.3%**	**0.0%**	**1.3%**	**2.9%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**
China including Hong Kong	54.7%	17.1%	26.5%	0.0%	26.5%	17.1%	17.1%	17.1%	0.0%	0.0%	9.4%	17.1%	0.0%	9.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
India	15.2%	0.0%	0.0%	45.2%	0.0%	0.0%	15.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Japan	23.0%	0.0%	0.0%	0.0%	30.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	23.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Malaysia	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Singapore	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
South Korea	0.0%	0.0%	0.0%	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Asia	41.9%	0.0%	48.8%	0.0%	41.9%	0.0%	0.0%	0.0%	0.0%	0.0%	5.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
AUSTRALASIA	**57.6%**	**8.6%**	**6.0%**	**8.9%**	**2.2%**	**2.5%**	**2.9%**	**0.0%**	**7.0%**	**3.5%**	**0.0%**	**0.0%**	**2.9%**	**0.0%**	**0.0%**	**5.8%**	**2.9%**	**0.0%**	**7.0%**	**0.0%**
Australia	58.4%	9.4%	6.6%	9.8%	0.0%	2.8%	3.2%	0.0%	7.6%	3.8%	0.0%	0.0%	3.2%	0.0%	0.0%	6.4%	3.2%	0.0%	7.6%	0.0%
New Zealand	50.0%	0.0%	0.0%	0.0%	25.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Australia	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
CENTRAL & SOUTH AMERICA	**72.2%**	**2.1%**	**0.0%**	**3.6%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**7.9%**	**2.4%**	**0.0%**	**0.0%**	**7.9%**	**0.0%**	**0.0%**	**0.0%**	**11.5%**	**0.0%**	**0.0%**
Argentina	32.4%	35.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Brazil	78.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	11.0%	0.0%	0.0%	0.0%	11.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Chile	73.1%	19.3%	0.0%	26.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Central & South America	57.2%	0.0%	0.0%	10.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	12.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	57.2%	0.0%	0.0%
EUROPE	**76.7%**	**20.6%**	**18.4%**	**5.1%**	**4.5%**	**5.7%**	**3.5%**	**3.5%**	**3.0%**	**2.1%**	**0.2%**	**2.2%**	**1.6%**	**0.9%**	**1.3%**	**0.7%**	**1.5%**	**0.6%**	**0.0%**	**1.1%**
Austria	92.4%	15.7%	30.9%	0.0%	0.0%	8.9%	0.0%	8.9%	7.6%	7.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Belgium	66.4%	19.9%	32.9%	6.8%	13.0%	13.0%	13.0%	13.0%	0.0%	0.0%	0.0%	13.0%	0.0%	0.0%	6.8%	0.0%	0.0%	0.0%	0.0%	0.0%
Denmark	55.3%	12.7%	25.4%	6.2%	0.0%	0.0%	0.0%	6.5%	0.0%	12.5%	0.0%	0.0%	0.0%	13.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Finland	100.0%	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
France	89.4%	20.8%	19.9%	2.9%	8.4%	6.6%	2.9%	5.5%	4.9%	2.9%	0.0%	2.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Germany	83.0%	23.3%	20.4%	3.6%	3.9%	5.0%	1.4%	1.2%	0.0%	2.5%	0.0%	1.4%	1.1%	0.0%	1.1%	0.0%	1.4%	1.4%	0.0%	0.0%
Ireland	77.4%	45.3%	22.6%	0.0%	13.2%	0.0%	0.0%	13.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	13.2%	0.0%	0.0%	0.0%
Italy	37.9%	0.0%	0.0%	62.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
The Netherlands	73.8%	22.6%	21.3%	1.7%	1.7%	3.4%	3.5%	3.4%	1.8%	1.7%	0.0%	3.4%	0.0%	1.8%	3.5%	0.0%	1.8%	1.7%	0.0%	1.8%
Norway	52.1%	26.1%	0.0%	21.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Portugal	100.0%	36.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Russian Federation	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Spain	62.0%	24.8%	0.0%	24.8%	0.0%	13.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sweden	54.0%	15.1%	27.0%	0.0%	19.8%	7.9%	19.8%	11.9%	7.2%	7.2%	0.0%	0.0%	7.9%	0.0%	11.9%	0.0%	0.0%	0.0%	0.0%	11.9%
Switzerland	94.5%	25.4%	20.3%	0.0%	5.5%	10.3%	10.0%	10.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Turkey	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Uk	66.8%	14.6%	8.6%	9.8%	3.3%	4.1%	3.3%	0.0%	9.0%	0.0%	1.0%	3.3%	5.8%	0.0%	0.0%	3.5%	2.3%	0.0%	0.0%	2.5%
Other Europe	83.4%	13.5%	17.9%	2.8%	3.4%	13.5%	2.8%	0.0%	0.0%	2.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
MIDDLE EAST	**56.4%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**
United Arab Emirates	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Middle East	65.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
NORTH AMERICA	**59.2%**	**28.2%**	**16.6%**	**10.3%**	**2.5%**	**1.8%**	**1.2%**	**0.0%**	**0.5%**	**1.9%**	**1.9%**	**0.7%**	**1.0%**	**1.2%**	**1.2%**	**1.8%**	**0.0%**	**0.0%**	**2.0%**	**0.0%**
Canada	34.2%	0.0%	36.4%	9.5%	0.0%	0.0%	9.5%	0.0%	0.0%	0.0%	8.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
USA	61.3%	30.5%	15.0%	10.4%	2.7%	1.9%	0.6%	0.0%	0.6%	2.1%	1.4%	0.7%	1.1%	1.3%	1.3%	1.9%	0.0%	0.0%	2.1%	0.0%
Other North America	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
TOTAL	**66.2%**	**19.5%**	**16.7%**	**9.0%**	**4.1%**	**3.9%**	**2.6%**	**2.3%**	**2.2%**	**2.1%**	**1.7%**	**1.6%**	**1.3%**	**1.2%**	**1.1%**	**1.1%**	**1.0%**	**0.8%**	**0.8%**	**0.6%**

APPENDIX

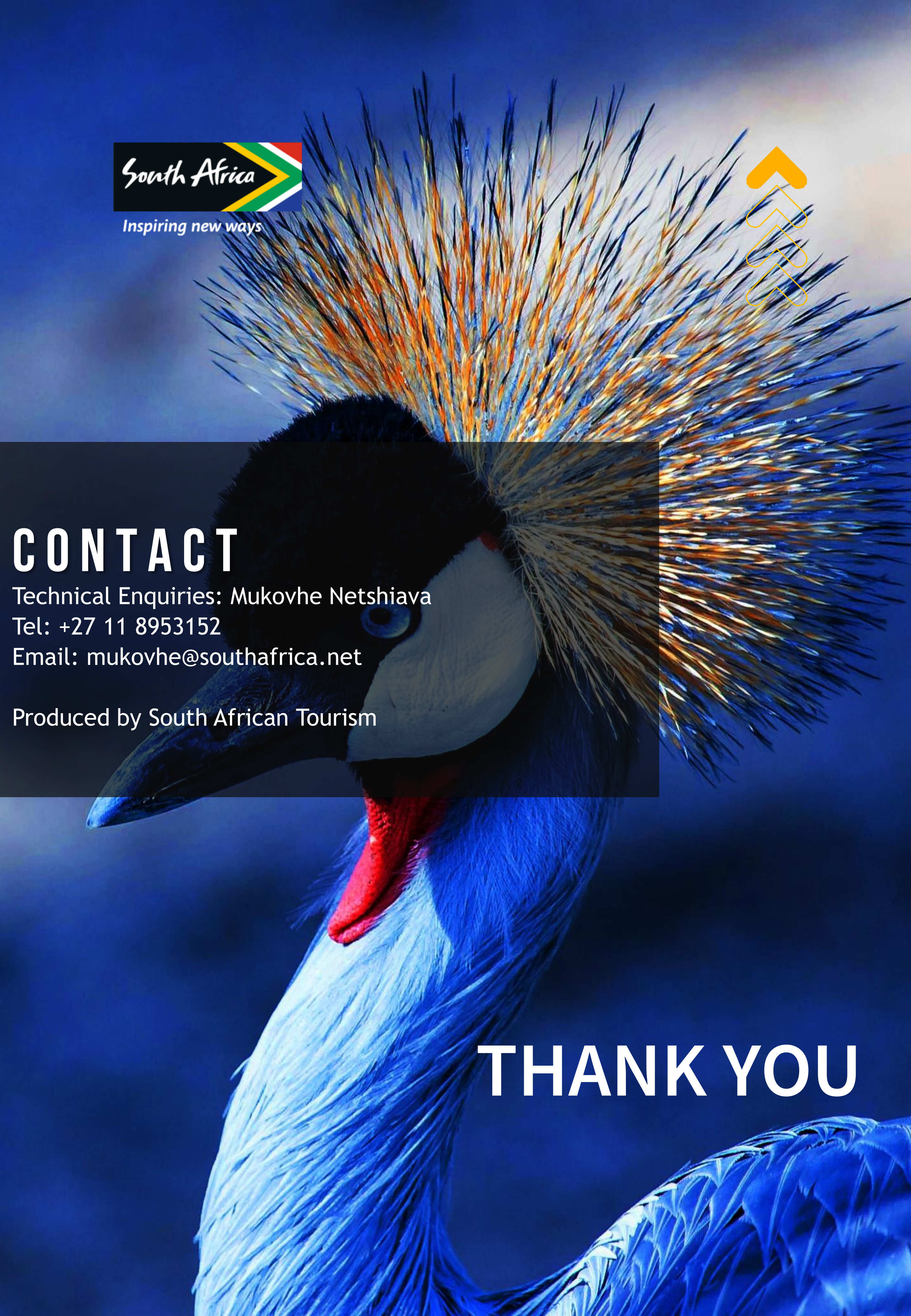
	NORTH WEST TOP 20 ATTRACTIONS BY SOURCE MARKETS - Q4 2025																			
	Pilanesberg National Park	Sun City Lost City	Hartbeespoort Dam	Waterfall Mall (Rustenburg)	Did not visit any	North-West University, Potchefstroom Campus	Madikwe Game Reserve	Hartbeespoort - Snake Park	Klerksdorp Mall	The cradle of humankind	Magaliesburg Resort	Mafikeng Mall	Brits Mall	Mooi River Mall	Ukutula Game Lodge	Upside-down House	Barberspan Bird Sanctuary	Bloemhof Dam Nature Reserve	Rustenburg shopping mall	Village Mall
AFRICA	**6.9%**	**18.9%**	**19.0%**	**16.5%**	**19.5%**	**15.8%**	**0.0%**	**9.7%**	**6.1%**	**0.0%**	**2.3%**	**8.0%**	**2.7%**	**9.2%**	**2.7%**	**0.0%**	**0.0%**	**0.0%**	**2.6%**	**0.0%**
Botswana	0.0%	72.9%	0.0%	0.0%	27.1%	0.0%	0.0%	45.8%	0.0%	0.0%	0.0%	72.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lesotho	0.0%	0.0%	0.0%	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Malawi	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mozambique	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Namibia	0.0%	0.0%	21.8%	0.0%	21.8%	37.5%	0.0%	0.0%	0.0%	0.0%	0.0%	18.8%	0.0%	37.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Eswatini	0.0%	50.0%	0.0%	0.0%	0.0%	50.0%	0.0%	0.0%	50.0%	0.0%	0.0%	50.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zambia	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	37.2%	0.0%	0.0%	0.0%	0.0%	37.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zimbabwe	0.0%	12.8%	37.2%	24.4%	25.6%	0.0%	0.0%	12.8%	0.0%	0.0%	0.0%	0.0%	8.4%	8.4%	0.0%	0.0%	0.0%	0.0%	8.0%	0.0%
Angola	0.0%	0.0%	50.0%	0.0%	50.0%	0.0%	0.0%	50.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
DRC	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Ethiopia	0.0%	0.0%	0.0%	0.0%	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Ghana	0.0%	21.9%	20.3%	0.0%	19.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	19.3%	19.3%	0.0%	0.0%	0.0%	0.0%	0.0%
Kenya	32.2%	0.0%	0.0%	0.0%	0.0%	67.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Nigeria	13.0%	0.0%	0.0%	12.1%	25.9%	49.0%	0.0%	13.0%	13.0%	0.0%	13.0%	0.0%	0.0%	0.0%	13.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tanzania	0.0%	0.0%	0.0%	39.8%	60.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Uganda	0.0%	34.3%	34.3%	34.3%	31.4%	34.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Africa	41.3%	41.3%	11.3%	36.7%	0.0%	18.5%	0.0%	0.0%	11.3%	0.0%	18.9%	0.0%	0.0%	7.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
ASIA	**36.2%**	**54.7%**	**35.8%**	**23.5%**	**5.1%**	**4.2%**	**0.0%**	**6.6%**	**16.0%**	**1.9%**	**16.0%**	**1.7%**	**1.9%**	**1.9%**	**2.3%**	**3.7%**	**1.9%**	**0.0%**	**0.0%**	**0.0%**
China including Hong Kong	33.3%	19.1%	0.0%	19.1%	47.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
India	60.4%	66.0%	8.8%	0.0%	0.0%	9.9%	0.0%	4.4%	0.0%	4.4%	0.0%	0.0%	4.4%	4.4%	5.5%	8.8%	4.4%	0.0%	0.0%	0.0%
Japan	0.0%	0.0%	0.0%	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Malaysia	100.0%	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Singapore	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
South Korea	0.0%	0.0%	0.0%	0.0%	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Asia	9.0%	49.1%	75.8%	47.4%	0.0%	0.0%	0.0%	11.3%	37.9%	0.0%	37.9%	3.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
AUSTRALASIA	**55.6%**	**34.0%**	**21.6%**	**4.2%**	**0.0%**	**0.0%**	**3.1%**	**9.7%**	**0.0%**	**8.8%**	**6.6%**	**3.1%**	**0.0%**	**0.0%**	**5.3%**	**0.0%**	**5.3%**	**0.0%**	**0.0%**	**0.0%**
Australia	57.1%	36.4%	20.7%	5.4%	0.0%	0.0%	3.9%	12.3%	0.0%	4.5%	8.4%	3.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
New Zealand	50.0%	25.0%	25.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	25.0%	0.0%	0.0%	0.0%	0.0%	25.0%	0.0%	25.0%	0.0%	0.0%	0.0%
Other Australia	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
CENTRAL & SOUTH AMERICA	**86.3%**	**23.3%**	**0.0%**	**11.6%**	**0.0%**	**0.0%**	**0.0%**	**1.0%**	**0.0%**	**1.0%**	**0.0%**	**7.3%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**7.3%**	**0.0%**	**0.0%**
Argentina	100.0%	45.6%	0.0%	0.0%	0.0%	0.0%	0.0%	45.6%	0.0%	45.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Brazil	82.7%	25.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	9.2%	0.0%	0.0%	0.0%	0.0%	0.0%	9.2%	0.0%	0.0%
Chile	100.0%	76.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Central & South America	100.0%	0.0%	0.0%	73.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
EUROPE	**57.6%**	**24.5%**	**10.1%**	**11.8%**	**6.9%**	**6.9%**	**9.1%**	**5.8%**	**5.6%**	**6.2%**	**5.5%**	**1.9%**	**4.7%**	**1.3%**	**1.3%**	**2.6%**	**1.2%**	**1.3%**	**0.8%**	**1.2%**
Austria	0.0%	23.7%	0.0%	0.0%	0.0%	27.6%	21.1%	0.0%	0.0%	0.0%	0.0%	0.0%	23.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Belgium	52.5%	23.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	23.7%	0.0%	0.0%	0.0%	0.0%	0.0%
Denmark	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Finland	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
France	80.0%	14.0%	8.0%	0.0%	6.0%	8.0%	6.0%	0.0%	0.0%	0.0%	14.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Germany	64.8%	32.1%	7.2%	4.8%	9.2%	11.4%	9.8%	5.0%	9.1%	9.4%	2.3%	2.1%	5.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.7%
Ireland	0.0%	0.0%	0.0%	0.0%	60.5%	0.0%	0.0%	0.0%	39.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Italy	73.4%	29.0%	0.0%	13.3%	0.0%	0.0%	13.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
The Netherlands	75.2%	14.6%	5.2%	9.7%	5.1%	0.0%	9.9%	5.1%	9.9%	0.0%	5.1%	4.9%	5.1%	0.0%	5.1%	5.1%	5.1%	5.1%	0.0%	0.0%
Norway	0.0%	0.0%	0.0%	0.0%	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Portugal	80.4%	80.4%	0.0%	0.0%	0.0%	0.0%	19.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Russian Federation	0.0%	0.0%	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Spain	76.6%	76.6%	0.0%	0.0%	0.0%	23.4%	0.0%	51.6%	0.0%	28.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sweden	58.3%	0.0%	27.8%	48.4%	0.0%	9.0%	48.4%	0.0%	0.0%	23.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Switzerland	35.4%	49.0%	0.0%	0.0%	0.0%	0.0%	15.6%	0.0%	0.0%	15.6%	15.6%	0.0%	17.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	17.7%
Turkey	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	61.0%	0.0%	0.0%	0.0%
Uk	48.2%	24.8%	13.8%	14.3%	6.3%	5.1%	4.6%	10.0%	5.4%	3.7%	8.5%	2.8%	5.8%	4.0%	1.2%	6.5%	0.0%	2.5%	2.5%	0.0%
Other Europe	69.7%	23.2%	10.9%	44.4%	0.0%	10.8%	12.7%	0.0%	0.0%	14.7%	6.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
MIDDLE EAST	**11.3%**	**31.7%**	**7.9%**	**0.0%**	**0.0%**	**20.3%**	**0.0%**	**3.3%**	**20.3%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**36.4%**	**11.6%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**
United Arab Emirates	0.0%	0.0%	100.0%	0.0%	0.0%	0.0%	0.0%	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Middle East	11.7%	32.7%	4.7%	0.0%	0.0%	21.0%	0.0%	0.0%	21.0%	0.0%	0.0%	0.0%	0.0%	37.7%	8.5%	0.0%	0.0%	0.0%	0.0%	0.0%
NORTH AMERICA	**52.6%**	**26.1%**	**10.5%**	**7.5%**	**10.4%**	**8.3%**	**13.5%**	**9.5%**	**10.0%**	**9.1%**	**1.2%**	**3.6%**	**2.2%**	**1.3%**	**1.0%**	**1.2%**	**2.4%**	**0.0%**	**0.0%**	**1.0%**
Canada	80.5%	48.2%	18.5%	30.5%	0.0%	18.5%	28.7%	0.0%	0.0%	19.5%	0.0%	28.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
USA	48.5%	22.9%	9.3%	4.2%	11.9%	6.8%	11.4%	10.9%	11.4%	7.7%	1.4%	0.0%	2.6%	1.5%	1.2%	1.4%	2.8%	0.0%	0.0%	1.2%
Other North America	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
TOTAL	**49.3%**	**26.2%**	**12.7%**	**11.6%**	**8.2%**	**7.7%**	**7.0%**	**6.9%**	**6.6%**	**5.3%**	**4.4%**	**3.4%**	**3.2%**	**3.0%**	**1.8%**	**1.7%**	**1.4%**	**1.1%**	**0.8%**	**0.7%**

APPENDIX

	NORTHER CAPE TOP 20 ATTRACTIONS BY SOURCE MARKETS - Q4 2025																				
	Did not visit any	Kimberley Big Hole	Diamond Pavilion Mall	Kgalagadi Transfrontier Park	Augrabies Falls	Kimberley Mine Museum	Namaqualand Flowers	Mokala National Park	Blue flag beach at Mcdougal Bay	Not applicable	Sutherland and Carnarvon - Stargazing (Salt and SKA)	North Cape Mall	San Cultural Villages (e.g. Khomani San Village etc) (Specify)	Diamond Pavillion Shopping Centre	Kathu Village Mall	Unspecified Shopping Mall	Kalahari Mall	Kalahari Mall	Kalahari Mall	Kalahari Mall
AFRICA	**64.6%**	**0.0%**	**35.4%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**18.2%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**
Botswana	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lesotho	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Malawi	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mozambique	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Namibia	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Eswatini	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zambia	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zimbabwe	60.5%	0.0%	39.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	39.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Angola	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
DRC	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Ethiopia	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Ghana	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Kenya	0.0%	0.0%	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Nigeria	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tanzania	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Uganda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Africa	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
ASIA	**21.0%**	**62.2%**	**37.5%**	**24.7%**	**7.8%**	**22.4%**	**7.8%**	**7.8%**	**7.8%**	**0.0%**	**7.8%**	**0.0%**	**7.8%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**
China including Hong Kong	12.7%	87.3%	87.3%	18.2%	18.2%	52.1%	18.2%	18.2%	18.2%	0.0%	18.2%	0.0%	18.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
India	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Japan	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Malaysia	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Singapore	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
South Korea	47.8%	0.0%	0.0%	52.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Asia	0.0%	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
AUSTRALASIA	**28.6%**	**28.6%**	**0.0%**	**28.6%**	**0.0%**	**0.0%**	**42.7%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**
Australia	50.0%	50.0%	0.0%	50.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
New Zealand	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Australia	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
CENTRAL & SOUTH AMERICA	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**
Argentina	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Brazil	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Chile	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Central & South America	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
EUROPE	**27.1%**	**36.9%**	**25.7%**	**21.4%**	**24.1%**	**17.4%**	**10.3%**	**9.3%**	**7.4%**	**1.5%**	**3.3%**	**1.5%**	**1.9%**	**1.5%**	**1.4%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**
Austria	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Belgium	0.0%	64.3%	67.8%	0.0%	32.2%	0.0%	32.2%	0.0%	32.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Denmark	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Finland	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
France	23.0%	17.3%	17.3%	17.3%	34.6%	0.0%	42.4%	17.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Germany	30.5%	32.3%	11.6%	30.5%	39.0%	11.6%	9.1%	32.3%	11.6%	0.0%	0.0%	0.0%	9.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Ireland	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Italy	63.3%	0.0%	0.0%	36.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
The Netherlands	0.0%	66.7%	33.3%	0.0%	66.7%	33.3%	33.3%	0.0%	33.3%	0.0%	33.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Norway	0.0%	100.0%	0.0%	100.0%	100.0%	0.0%	0.0%	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Portugal	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Russian Federation	0.0%	46.5%	53.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Spain	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sweden	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Switzerland	51.5%	48.5%	0.0%	48.5%	48.5%	48.5%	48.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Turkey	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Uk	25.6%	31.9%	31.9%	15.5%	15.5%	26.4%	0.0%	0.0%	4.5%	4.6%	4.5%	4.6%	0.0%	4.6%	4.5%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Europe	25.9%	74.1%	24.7%	74.1%	0.0%	49.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
MIDDLE EAST	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**84.3%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**15.7%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**
United Arab Emirates	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Middle East	0.0%	0.0%	0.0%	0.0%	84.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	15.7%	0.0%	0.0%	0.0%	0.0%
NORTH AMERICA	**38.5%**	**28.6%**	**18.7%**	**33.1%**	**9.7%**	**18.8%**	**4.6%**	**9.1%**	**0.0%**	**0.0%**	**0.0%**	**4.1%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**
Canada	27.8%	46.4%	0.0%	49.0%	23.2%	23.2%	23.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
USA	41.1%	24.1%	23.4%	29.2%	6.3%	17.8%	0.0%	11.4%	0.0%	0.0%	0.0%	5.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other North America	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
TOTAL	**32.5%**	**31.2%**	**24.2%**	**21.6%**	**18.6%**	**15.2%**	**8.8%**	**7.8%**	**4.7%**	**2.7%**	**2.2%**	**1.7%**	**1.4%**	**0.9%**	**0.9%**	**0.4%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**

APPENDIX

	FREE STATE TOP 20 ATTRACTIONS BY SOURCE MARKETS - Q4 2025																			
	Did not visit any	Mimosa Mall	Golden Gate Highlands National Park	Waterfront	Welkom Mall	University of the Free State	Free State Stadium/Vodacom Park	Gariep Dam	Black Mountain Hotel	Basotho cultural village	Clarens Ash River Outfall	Not Applicable	Northridge Mall	Sterkfontein Dam Nature Reserve	Maluti Cave Hiking Trail	Dihlabeng Mall	Galleries or Museums	Galleries or Museums	Bushmen Paintings in Schaaplaats	Bethlahem Mall
AFRICA	**78.1%**	**9.1%**	**0.0%**	**12.6%**	**6.4%**	**0.0%**	**3.0%**	**0.0%**	**1.4%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.5%**	**1.4%**	**0.0%**	**0.0%**	**0.0%**	**1.4%**	**0.0%**
Botswana	0.0%	0.0%	0.0%	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lesotho	0.0%	0.0%	0.0%	0.0%	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Malawi	41.9%	58.1%	0.0%	58.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mozambique	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Namibia	50.0%	0.0%	0.0%	0.0%	0.0%	0.0%	50.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Eswatini	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zambia	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zimbabwe	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Angola	55.2%	44.8%	0.0%	0.0%	44.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
DRC	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Ethiopia	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Ghana	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Kenya	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Nigeria	0.0%	0.0%	0.0%	100.0%	0.0%	0.0%	0.0%	0.0%	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	100.0%	0.0%	0.0%	0.0%	100.0%	0.0%
Tanzania	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Uganda	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Africa	0.0%	100.0%	0.0%	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
ASIA	**22.3%**	**55.0%**	**0.0%**	**7.6%**	**13.9%**	**23.3%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**22.7%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**
China including Hong Kong	0.0%	100.0%	0.0%	42.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
India	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Japan	0.0%	100.0%	0.0%	0.0%	0.0%	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Malaysia	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Singapore	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
South Korea	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Asia	0.0%	38.0%	0.0%	0.0%	38.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	62.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
AUSTRALASIA	**38.3%**	**21.7%**	**9.2%**	**21.7%**	**27.5%**	**0.0%**	**0.0%**	**12.5%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**12.5%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**
Australia	33.3%	23.4%	9.9%	23.4%	29.7%	0.0%	0.0%	13.5%	0.0%	0.0%	0.0%	0.0%	0.0%	13.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
New Zealand	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Australia	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
CENTRAL & SOUTH AMERICA	**100.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**
Argentina	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Brazil	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Chile	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Central & South America	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
EUROPE	**32.2%**	**22.4%**	**23.0%**	**20.1%**	**10.4%**	**5.8%**	**5.3%**	**2.5%**	**4.0%**	**2.6%**	**1.2%**	**3.4%**	**2.6%**	**0.0%**	**1.1%**	**0.0%**	**0.0%**	**0.0%**	**0.8%**	**1.2%**
Austria	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Belgium	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Denmark	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Finland	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
France	34.1%	23.0%	14.3%	14.3%	14.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	14.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Germany	19.6%	10.1%	46.2%	12.0%	10.1%	0.0%	12.0%	0.0%	0.0%	0.0%	0.0%	12.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Ireland	44.8%	55.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Italy	46.6%	0.0%	26.7%	26.7%	0.0%	26.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
The Netherlands	38.0%	13.0%	12.0%	25.0%	12.0%	12.5%	0.0%	0.0%	0.0%	12.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Norway	0.0%	45.6%	45.6%	0.0%	54.4%	45.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Portugal	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Russian Federation	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Spain	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sweden	0.0%	100.0%	37.8%	62.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Switzerland	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Turkey	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Uk	28.0%	30.5%	20.4%	30.6%	10.9%	6.3%	7.1%	7.0%	10.9%	3.1%	3.2%	0.0%	3.2%	0.0%	3.1%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Europe	31.1%	0.0%	37.0%	0.0%	12.5%	0.0%	12.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	12.5%	19.4%
MIDDLE EAST	**24.4%**	**1.6%**	**1.6%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**24.4%**	**0.0%**	**24.4%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**
United Arab Emirates	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Middle East	24.4%	1.6%	1.6%	0.0%	0.0%	0.0%	0.0%	24.4%	0.0%	24.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
NORTH AMERICA	**26.5%**	**23.9%**	**21.9%**	**9.1%**	**15.7%**	**4.5%**	**5.5%**	**0.0%**	**0.0%**	**5.5%**	**11.2%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**5.7%**	**5.5%**	**5.5%**	**0.0%**	**0.0%**
Canada	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
USA	21.6%	25.4%	23.3%	9.7%	16.7%	4.8%	5.8%	0.0%	0.0%	5.8%	11.9%	0.0%	0.0%	0.0%	0.0%	6.1%	5.8%	5.8%	0.0%	0.0%
Other North America	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
TOTAL	**41.2%**	**20.1%**	**16.6%**	**16.5%**	**11.3%**	**4.3%**	**4.3%**	**2.6%**	**2.5%**	**2.5%**	**2.2%**	**1.9%**	**1.9%**	**0.9%**	**0.9%**	**0.8%**	**0.8%**	**0.8%**	**0.7%**	**0.7%**



South Africa

Inspiring new ways

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THANK YOU